

Oracle® Retail Order Administration Cloud Service Technical Guide



Release 25.1.101.0
G12847-07
March 2025



Copyright © 2025, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

1	Contents	
2	Glossary	
3	System Control Values	
4	Configuration and Administration	
	Document Management (My Docs)	4-2
	Forms Management (My Forms)	4-12
	Job Management (My Jobs)	4-23
5	Accounting Setup	
	Setting Up the Accounting Tables	5-1
6	Customer Service	
	Establishing Customer Service Tables	6-1
	Setting Up Customer Support Tables	6-2
	Creating and Updating Customers	6-3
	Understanding Customer Types	6-4
	Selecting Customers	6-6
	Work with Contract Price Screen	6-12
	Working with Customer Tax Status	6-13
	Working with Pay Type Exclusions	6-19
	Reviewing Customer History	6-20
	Work with User Fields Screen	6-47
	Reviewing Customer Address Changes	6-49
	Working with Customer Email Addresses	6-53
	Working with Customer Ownership	6-71
	Working with Alternate Customer Number Cross-References	6-73

Order Inquiry	6-75
Reviewing the Order Inquiry Header Screen	6-76
Reviewing Order Inquiry Detail Information	6-85
Reviewing Order Details	6-99
Options Available in Order Inquiry	6-124
Reviewing Financial Information on an Order	6-127
Reviewing Invoices	6-128
Reviewing Payment Methods	6-164
Display Additional Charges Screen	6-178
Display Refunds for Order Screen	6-180
Display Order Summary Screen	6-181
Displaying Order Totals in Foreign Currency	6-184
Reviewing Order-Level Properties	6-185
Display Order Line History Screen	6-192
Display Order History Screen	6-195
Display Package Information Screen	6-204
Performing Order Maintenance	6-207
Introducing Order Maintenance	6-208
Selecting an Order for Maintenance	6-213
Work with Order Screen in Order Maintenance	6-223
Changing Item Detail Line Information in Order Maintenance	6-231
Adding an Item in Order Maintenance	6-246
Increasing the Quantity Ordered in Order Maintenance	6-247
Canceling an Item in Order Maintenance	6-248
Canceling an Order through Order Maintenance	6-256
Returning and Exchanging Items in Order Maintenance	6-259
Enter Payment Methods Screen in Order Maintenance	6-278
Adding a Recipient Order in Order Maintenance	6-289
Maintaining Quotes in Order Maintenance	6-292
Converting Quotes to Orders	6-304
Managing Declined Authorizations	6-311
Releasing Held Orders	6-312
Introducing Order Hold Reason Codes	6-312
Displaying Order Hold Information	6-324
Performing the Release	6-326
Managing Returns	6-332
Working with Return Authorizations: Standard Process	6-333
Working with Return Authorizations: Streamlined Process	6-355
Issuing Refunds	6-375
Introducing the Refund Process	6-375
Working with Catalog Requests	6-378
Catalog Request History Options	6-379

Managing Soldouts and Backorders	6-379
Purchase Order Layering and Backorder Notifications	6-379
Processing and Purging Subscriptions	6-383
Memberships	6-383
Membership Overview	6-384
Email Repository	6-397
Customer Service Appendices	6-398
Displaying More Options in OIOM	6-398
Purchase Order Layering	6-437
Creating and Updating Ship-to Customers (WCST)	6-440
Creating and Updating Sold-to Customers (WCST)	6-453
Introducing Return Authorizations (WRTA)	6-485
Using the Order Inquiry Scan Screens (OIOM)	6-491
Selecting Orders for Return (WRTA)	6-508
Working with Customer Warranty Information (WCST)	6-514

7 Fulfillment

Reserving Inventory and Generating Pick Slips	7-1
Reviewing Reservation Types	7-2
Reviewing Other Reservation Conditions	7-7
Preparing Orders for Pick Slip Generation	7-10
Performing Pick Slip Generation	7-38
Confirming and Billing Shipments	7-115
Drop Ship Pick Slip/Invoice	7-115
Order Orchestration Drop Ship Integration	7-124
Setting Up the Fulfillment Tables	7-125
Interface with Order Orchestration's Supplier Direct Fulfillment Module: Overview and Setup	7-126
Supplier Direct Fulfillment Processing	7-132
Shipping Zone Reservation	7-142
Shipping Zone Reservation Overview	7-142

8 Installation Setup

Establishing Security	8-1
Security Shell Components	8-1
Using the Menu Driver	8-6
Menu Driver Screen	8-6
Setting Up Application Areas	8-14
Setting Up Application Groups	8-16

9 Marketing

Setting Up Offer Information	9-1
Introducing Offer and Source Codes	9-1
About Messaging Promotions	9-10
About Discount Promotions	9-10
Promotion Logic and Processing	9-41
Work with Promotions Screen	9-53
Promotion Upload	9-85
Setting Up Pricing Information	9-125
Understanding Promotional Pricing	9-126
Regular Price Code Pricing	9-127
Work with Price Codes Screen	9-143
Price Code Upload	9-149
Customer Price Group SKU Exclusion Upload	9-161
Customer Price Group Pricing	9-166
Line Level Customer Price Group Pricing	9-170
Customer Price Group Price Code Pricing	9-179
Customer Price Group Best Price Comparison	9-195
Customer Price Group Pricing in Order Maintenance	9-203
Reviewing Forecasting Information	9-203
Using House List Options	9-203

10 Merchandising

Setting Up the Item Supporting Tables	10-1
Setting Up the Purchasing Tables	10-2
Creating and Working with Items	10-2
Working with SKUs	10-3
Assigning Items to Warehouses	10-6
Entering Additional Item Information	10-10
Copying Items	10-19
Setting up SKUs	10-38
Introducing SKU Setup	10-38
Working with Sets	10-39
Introducing Sets	10-39
Updating Items and SKUs	10-40
Assigning Items/SKUs to Offers	10-41
Maintaining Purchase Orders	10-51
Using Purchase Order Inquiry	10-51
Printing Purchase Orders	10-51
Performing Inventory Analyses	10-51

Retail Integration (External System to Order Administration)	10-52
Retail Integration (External System into Order Administration) Overview and Setup	10-52
Performing Initial Item Entry (MITM)	10-63
Working with Existing Items (MITM)	10-113
Working with Item Ship Via Overrides	10-115

11 Order Entry

Entering Orders	11-1
Introducing Order Entry	11-2
Setting Defaults in Order Entry	11-5
Selecting Customers in Order Entry	11-7
Customer Scan Screen	11-35
Entering Orders	11-47
Work with Order Screen	11-50
Work with Order Lines Screen (Adding Items to the Order)	11-85
Applying Payment to the Order	11-135
Completing Order Entry	11-161
Order Entry Updates	11-176
Working with Items on the Order	11-184
Upselling the Customer in Order Entry	11-236
Expanding the Address in Order Entry	11-251
Using a Permanent Shipping Address in Order Entry	11-258
Assigning an Order Shipping Address	11-269
Adding a Recipient Order in Order Entry	11-275
Assigning a Billing Address in Order Entry	11-285
Defining Order Properties	11-293
Adding Order Messages	11-301
Adding Miscellaneous Charges or Credits in Order Entry	11-307
Displaying More Options in Order Entry	11-315
Entering User Fields	11-317
Working with Order Summary Information	11-318
Posting a Return or Exchange Through Order Entry	11-326
Entering Customer Memberships in Order Entry	11-329
Entering Coupon Promotions on an Order	11-335
Working with an Order-Level Email Address	11-343
Valid Ship Vias for Window	11-347
Tracking Order/Call Disposition Activity	11-349
Entering Pre-Order Quotes	11-354
Customer Engagement Gift Registry and Customer Wish List Integration	11-378
Working with Error Order Batches	11-384
Introducing Order Batches	11-384

Working with an Order Batch	11-385
Performing Batch Order Entry	11-390
Accepting or Rejecting the Order Batch	11-391
Order Creation Errors	11-403
Order Entry Appendices	11-410

12 System Operations

Operating Background Jobs	12-1
Using the ASYNC Jobs (MBJC)	12-2
Working With the CNTL_ASYNC Job	12-6
Working With the BILL_ASYNC Jobs	12-17
Working With the EBO ASYNC Job	12-26
Working With the ORDR_ASYNC Job	12-29
Working With the OTHR_ASYNC Job	12-35
Running Period End Processing	12-40
Releasing Orders from Time Hold	12-41
Using the System Utilities	12-42
Working with Inventory Resets	12-43
Working with File Imports	12-43
Setting Up Authorization Services	12-65
Defining Authorization Services (WASV)	12-66
Defining Authorization Service Countries	12-78
Defining Vendor Paytype Codes	12-81
Defining Vendor Response Codes	12-83
Defining Merchant ID Overrides	12-111
Defining Authorization Service Currencies	12-113
Performing Online Credit Card Authorizations	12-115
Processing Authorizations and Deposits Using Point-to-Point Communication	12-128
PayPal Direct Connection Integration	12-128
External Payment Service	12-159
Purging Tables	12-166
Purging Sold To Customers	12-166
Additional Purges	12-168
Flexible Payment Options	12-169
Deferred/Installment Billing Overview	12-169
Deferred/Installment Billing Setup	12-179
Credit Card Net Exchange Billing	12-182
Processing Deposits	12-213
E-Commerce Interface	12-214
Workflow Management	12-214
Workflow Management Overview and Setup	12-215

Event Rule Settings	12-228
Work with Tickler Event Screen	12-231
Create Tickler Event Rule Screen	12-233
BO (Backorders) Event Processing	12-237
CO (Cancelled Orders) Event Processing	12-240
HO (Held Orders) Event Processing	12-244
MN (Manually Created) Event Processing	12-247
NO (New Orders) Event Processing	12-248
OO (Aged Open Orders) Event Processing	12-252
SD (SVC Activation Decline) Event Processing	12-256
SO (Soldout Orders) Event Processing	12-256
SV (SVC Number Assignment) Event Processing	12-260
UP (Unconfirmed Pick Tickets) Event Processing	12-261
VP (Voided Pick Tickets) Event Processing	12-264
WF (Remote Workflow) Event Processing	12-267
Work with Tickler Event Rule Procedure Screen	12-268
Work with Tickler Event Rule Screen	12-268
Change Tickler Event Screen	12-270
Tickler Event Settings	12-274
Point of Sale Integration	12-285
Point of Sale Integration Overview	12-286
Batch Inventory Overlay Upload	12-297
Importing Store Cross Reference Locations through Order Orchestration's Discovery Web Service	12-300
Stored Value Card Integration	12-302
Stored Value Card Overview and Setup	12-302
Stored Value Card Purchase and Activation	12-315
Stored Value Card Authorization Reversal	12-327
Generating Stored Value Card Refunds	12-338
Importing Item/SKU and Set Data	12-341
Integration Layer Processes and Web Services	12-341
Merchandise Locator API	12-358
Brokered Backorders	12-377
Order Orchestration Originating Location, Fulfilling Location, and Pickup Location	12-418
Order Orchestration Status Summary Table	12-421
Retail Pickup (including Ship-for-Pickup) or Delivery Orders	12-425
Ship-for-Pickup Orders	12-443
Store Pickup Orders	12-455
Troubleshooting the Order Orchestration Integration	12-477
Tracking User, Authority, and Password Updates	12-481
Translating Special Characters	12-507

13 Warehousing

Performing Inventory Transactions	13-1
Transaction History	13-1
Inventory Transaction Setup	13-1
Item Where Used	13-2
Purchase Order Receipts	13-2
Purchase Order Receiving Overview	13-2
Managing Warehouses	13-12
Creating and Maintaining Item Warehouses	13-12
Pending Putaway Overview	13-23
Docking Purchase Orders	13-29
Warehouse Management Integration	13-29
Warehouse Management System Integration Overview	13-30
Receiving Purchase Orders (PORC)	13-32
Selecting Purchase Orders for Receipt (PORC)	13-64

Preface

Documentation Accessibility

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

Access to Oracle Support

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

Customer Support

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

<https://support.oracle.com>

When contacting Customer Support, please provide the following:

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

Oracle Help Center (docs.oracle.com)

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

Comments and Suggestions

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

Oracle Retail Cloud Services and Business Agility

Oracle Retail Order Management System 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

Contents

- [Accounting Setup](#): Includes general accounting setup.
- [Customer Service](#): includes customer maintenance, order inquiry, order maintenance, returns, backorder and soldout process, refunds, and memberships.
- [Fulfillment](#): includes pick slip generation, drop ship processing, Order Orchestration Drop Ship Manager integration, and shipment confirmation.
- [Installation Setup](#): includes system control values, number assignment, and secured features.
- [Marketing](#): includes promotions, source code and offer setup, and list management.
- [Merchandising](#): includes item maintenance and purchase order maintenance.
- [Order Entry](#): includes the generic order API.
- [System Operations](#): includes utilities, periodic processing, authorizations and depositions, the e-commerce interface, stored value cards, the point-of-sale integration, and Order Orchestration integration.
- [Warehousing](#): includes purchase order receiving and warehouse management.

See the [Menu Driver Screen](#) for information on the options at this screen.

2

Glossary

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

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

Address Standardization allows you to use a third-party service (such as Experian's Data Quality Address Validate API) to provide accurate address information on customer records and orders. Two methods of address standardization are used in Order Administration Cloud Service:

- An Address Validation rest API is utilized in Classic View screens and non-interactive processing such as order API. The rest API captures, cleans, and enhances address records and validates the address data against national postal authorities, such as the U.S.
- Type-ahead address lookup is utilized in Modern View screens. Type-ahead attempts to find valid address information provided by the Address Standardization service while the user is typing the address on the screen.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Credit card security services (CID, CVV2, CVC2) help to reduce the fraudulent use of credit cards by verifying that the credit card is present at the point of sale and to ensure that the

credit card security value from the transaction matches the security value stored by the service bureau for that card.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Mass Customer Download allows you to download a batch file of new and changed customers to an external system. Note that this option is not currently implemented.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Properties define system-wide configuration settings for Order Administration.

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

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

Quoting allows you to create a pre-order for a customer listing the items the customer wishes to order and the estimated order totals should the customer agree to place the order. The

system does not reserve inventory or perform background async updates for the quote until it is converted to an order. Optionally, the system assigns an expiration date to a quote, indicating how long the estimated quote is valid before it expires.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Store pickup order: Use the store pickup integration with Order Orchestration to send orders to an external retail location where the merchandise is already available for pickup. Unlike a ship-for-pickup order, a store pickup order does not require Order Administration to transfer the inventory to the store. The ship-to address on a store pickup order sent from Order Administration to Order Orchestration is the name and address of the originating store location.

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

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

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

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

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

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

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

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

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

to companies, menu options, secured features and user defined functions can also be assigned at the user class level.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

3

System Control Values

System Control Values

[A](#) / [B](#) / [C](#) / [D](#) / [E](#) / [F](#) / [G](#) / [H](#) / [I](#) / [J](#) / [K](#) / [L](#) / [M](#)

A

[FIFO Flag \(A03\)](#)

[Default Warehouse \(A04\)](#)

[Current OE/OM SKU Mapping Sequence \(A14, A15, A16\)](#)

[Inventory Transaction History Retention Days \(A24\)](#)

[Suggest Location Placement \(A27\)](#)

[Location Types \(A28\)](#)

[Random Stock Location Usage \(A29\)](#)

[Random Stock Location Assignment Sequence \(A30\)](#)

[Location Capacity Method \(A31\)](#)

[Current Offer \(A33\)](#)

[Split SKU Element Column 1 Heading \(A34\)](#)

[OE/OM Mapping \(A42, A43, A44\)](#)

[Split SKU Element Column Headings \(A52, A53, A54\)](#)

[Local Currency Code \(A55\)](#)

[# of Days Before PO Purge \(A58\)](#)

[Allow Receipt to Suspense \(A59\)](#)

[Allow Additional Costs to P/O Receipts \(A60\)](#)

[Over Receipt % \(A61\)](#)

[Under Receipt % \(A62\)](#)

[P/O Receipt Detail Entry Method \(A63\)](#)

[Immediate Reservation \(A64\)](#)

[Include Print Quantity in Available Calculations \(A65\)](#)

[Replenish from Location Type \(A66\)](#)

[Fraud Checking \(A68\)](#)

[Inventory Sharing \(A69\)](#)

[Allow Multi-Payment Types \(A74\)](#)

Display Order Recap (A75)
Create/Assign Bill To Customers in Order Entry (A76)
Default Ship Via (A77)
Best Way Pricing (A78)
Offer Price Sequence # (A79)
Quantity Break by SKU Sequence # (A80)
Column Sequence # (A81)
Special by Source Sequence # (A82)
Contract Sequence # (A83)
Customer Discount Sequence # (A84)
Quantity Break/Item (A87)
GST Rate (A90)
GST Item Status Default (A91)
Maximum Order Amount (A92)

B

Use Zip/City/State Defaulting? (B13)
Tax on Freight (B14)
Tax on Handling (B15)
Ship Complete from 1 Warehouse (B16)
Default Country for Customer Address (B17)
Default Item History Tracking (B18)
Split Line Over Multi Whse (B19)
Reservation Lead Days (B27)
Default Order Type (B28)
Item Volume Discount (B29)
Default Order Quantity (B30)
Pricing Values (B31)
Split SKU Values (B32)
Default Item Unit of Measure (B33)
Auto Advance to SKU Create (B34)
Default Price Override Reason (B35)
Pick Processing Days (B37)
Use Cart/Bin Picking? (B38)
Maximum Number of Single Line Picks (B39)

Maximum Number of Multi Line Picks (B40)
Maximum Number of Zones (B41)
Cube of Cart (B42)
Cube of Bin (B44)
Minimum Number of Picks in a Cart (B47)
Backorder Free Gifts (B48)
Consolidated Invoice (B49)
Edit Warehouse/Reservation Values Screen (B50)
Alternate Pay Type (B51)
Return Grace Period (B52)
Price Override Code for Promotional Priced Lines (B61)
Address Service Authorization Token (B66)
Address Validation Service Endpoint URL (B67)
Address Type-Ahead Service Endpoint URL (B68)
On-line Authorizations (B89)
Gift Order Acknowledgement Print Program (B90)
Automatic Generation of Gift Acknowledgement (B92)

C

Define Special Forms (C03)
Default Primary Location (C05)
Default Cash Pay Type for Write-off (C07)
Default Primary Location - Suspense Placement and PO Receipts (C08)
Duplicate Item Check (C09)
Use Auto Authorization Interface (C14)
Labels at PO Receipts (C16)
Default Disposition Code (C18)
Auto Soldout Cancel Reason (C20)
Default Version for Order Inquiry (C34)
Print Credit Card Credit Acknowledgments (C35)
Let Down Replenishment (C36)
Pick Printing Program (C37)
Batch Pull Sheet Printing Program (C38)
Cart/Bin Batch Pull Sheet Printing Program (C39)
Type of Location to Search First during Suggest Location Placement (C40)

Type of Location to Search Second during Suggest Location Placement (C41)
Type of Location to Search Third during Suggest Location Placement (C42)
Suggest Multiple Items in a Location during Suggest Location Placement (C43)
Suggest Warehouse Placement (C44)
Default Additional Charge Code (C45)
Use Default Current Source Code (C46)
Default Cash Customer (C49)
Check Location Quantities During Pick Generation (C54)
Duplicate Item Days (C58)
Print Batch Pull Sheet Item Summary (C59)
Maximum Order Quantity (C60)
Default SKU Generator Vendor Item (C61)
Order Purge Days (C62)
PO Print Program (C64)
Pick Sort Program Name (C65)
Declared Value Type (C66)
FTC -- # of Days to Add for Special Handling (C67)
FTC -- # of Days to Add for Drop Ships (C68)
FTC -- Action after Second Notification (C70)
FTC -- # of Days for Items without Expected Ship Date (C71)
Update Demand for Order Maintenance Transactions (C72)
PO Print Program for PO Print in PO Sequence (C76)
Print Amounts on Drop Ship Picks (C81)
Allow Only Single Line on Drop Ship Pick (C82)
Authorize Only Merchandise for Drop Ship (C92)

D

Backorder Card Print Program (D04)
Days after 2nd Backorder Notification to Cancel Order (D07)
Update of Current Source Code in Customer File (D08)
Default Associate Code (D09)
Default Mail Name (D10)
Default Rent Name (D11)
Allow Multiple Primary Item Locations (D12)
Default Delivery Code for New Order Entry Customers (D13)

Default "Gift Order" Flag (D14)

Phone Numbers (D15)

Order Discount Percentage Limit (D16)

Load Source from Mailing History (D20)

Credit Card Credit Acknowledgment Print Program (D22)

Refund Check Print Program (D23)

Maximum Order Amount for Fraud Checking (D24)

of Times Shipped to Same Address (D25)

of Days Since Last Order (D26)

Preauthorize Backorders (D32)

User-defined Field Prompting for Existing Customers (D33)

Default Source Code for Batch Catalog Requests (D37)

Display Discount on Order Recap Screen (D38)

Prorate Freight Charges (D39)

Vendor Name Display (D41)

Display Item Description (D45)

Auto Assign Item # (D46)

of Pick Control Labels (D47)

Override Offer on Order Detail Line (D49)

Sort Pick Slips by Gift Flag (D53)

Sort Picks by Foreign/Domestic Flag (D54)

Display Customer Notes in LIFO Sequence (D55)

Display Item Alias (D56)

Print Warehouse Address on Pick Slips (D60)

Perform Source Pricing Validation (D62)

Default Customer Class in Order Entry (D63)

Enter Custom Special Handling in Upper and Lower Case (D65)

Generate Custom Special Handling File (D66)

Evaluate Special Handling Charges by Order Line (D67)

Track Invoice Currency (D68)

Default Soldout Control Code (D72)

Use Source Code from Order Header When Creating Order Lines (D73)

Require Reason for Lines Added in Order Maintenance (D75)

Vendor Discount % to Costing at Receiving (D76)

Include Handling in Freight Charge Calculation (D77)
Allow Order for New Bill-to Without Order Hold (D84)
Extra Weight for Order Weight Freight Method (D85)
Check User Class/Vendor Authority (D88)
Number of Days to Delay Initial Backorder Notice (D89)
Prorate Dollar Discounts and Coupons (D90)
Maximum Discount Amount (D91)
Price Override Reason for Same Price Exchanges (D92)
Price Codes (D93)
Default Soldout Control Code for Item to Item Transactions (D94)
Apply Discount to Manual Cost (D96)
Discount 1 Field (D97)
Discount 2 Field (D98)
Discount 3 Field (D99)

E

Multi Currency by Offer (E03)
Default Price Table (E04)
Price Table Level Override Code (E05)
Price Table Sequence # (E06)
Price Tables (E07)
Order Type to Process as Catalog Request/Item Samples (E08)
Default Ship Complete Flag (E09)
Update Bill-to Address with Sold-to Address Changes (E13)
Default Staging Warehouse (E15)
Vendor/PO Discount Values (E18)
Validate Primary Locations for Purchase Orders (E19)
Invoice Consolidation Method (E29)
Print Alpha \$ Amount on Refund Check (E30)
Break Single Line Picks by Zone (E33)
Print One Drop Ship Invoice per Ship Alone Item (E38)
Create Item Transaction History for Non-Inventory Items (E39)
Replenishment Report Program Name (E47)
Evaluate Promotional Items/Inserts in Order Entry/Maintenance (E48)
Negative Additional Charge Limit (E49)

Dollar Method Used to Evaluate Offer Ship Via Override (E50)
Future Orders Item Status (E52)
Default Future Orders Arrival Date (E53)
Price Override Limit Percent (E55)
Demand Update for Non-Inventoried Items (E59)
Prompt for Mandatory Demographics in Order Maintenance (E60)
Credit Card Authorization AVS Hold Exemption/Bypass (E61)
Sold Out Retention Method (E63)
Default Source for Internet Orders (E65)
FTC--Number of Days Prior to Next Backorder Date to Generate Second Notice (E67)
FTC--Second Notice Output (E68)
Number of Days to Add for Accepted Delays (E69)
Tax Included in Price (E70)
Override Offer/Page/Alias on Order Detail (E72)
Use Item Freight Exemption File (E73)
Maximum Number of Retries on Credit Card Orders (E74)
'Soldout Notification Print Program (E75)
Auto Advance to Vendor Item Create (E78)
Tax Inclusive Cutoff Date (E79)
Require Long SKU Division with Long SKU Department (E85)
Default Salesrep Number (E86)
Require Salesrep Number in Order Entry/Order Maintenance (E87)
Modulus 10 Check on Salesrep Number (E88)
Sort Picks by Pick Sequence (E89)
Display Special Format Response Descriptions in Order Entry (E90)
Drop Ship Pick Print Program (E92)
Add Printed Drop Ship Lines as Backordered on Pick (E93)
User Defined Modulus Check Program (E94)
Use Async Start Date for Billing Transactions (E95)
Allow Negative Prices in Order Entry (E97)
Maximum Order Line Value (E98)

F

Display Order Line Discount Messages (F01)
Withhold Picks due to Item Allocation Error (F04)

Load Order Header Source from Mailing History (F05)

Require Item Class in Work with Items (F06)

Gift Wrap Default (F07)

Number of Billing Async Jobs to Start (F08)

Print Drop Ship Invoice at time of Purchase Order Receiving (F10)

SKU Purge Days (F11)

Quantity Required for Purchase Order SKU Scanning (F15)

Unconditional Suppression of Backorder Card (F19)

Replenishment Label Program Name (F20)

Require Sort Sequence Number in the SKU File (F23)

Auto Assign Sort Sequence Number During SKU Generation (F24)

Display SKU Description in place of SKU Element (F25)

Use Computer Telephony Integration (F26)

Update CTI Customer Call Log (F27)

Pick Label Print Program (F28)

Display Purchase Order Receiving Overage Warning Message (F29)

SKU Element for Auto Linking Coordinates (F39)

SKU Element for Order Entry Filtering (F40)

Display Backordered Coordinate Sale Items (F41)

Require Exchange Item at Time of Receipt (F42)

Restrict Additional Charge Amount if Default Charge (F43)

Use Streamlined Return Authorizations (F44)

Deferred and Installment Billing (F51)

Number of Times Flexible Payment Option is Used (F52)

Number of Days Flexible Payment Option is Used (F53)

Dollar Threshold for Sold To Customer Orders with Flexible Payments (F54)

Net Credit Card Credits for Deferred and Installment Billing (F55)

Warehouse Replenishment Label Program (F57)

Retail Order Defaults (F59)

Postal Code Scan Length (F61)

Recalculate Freight Default (F62)

Batch Item Pull Label Printing Program (F63)

Display Customer Action Notes/Messages in RA (F64)

Sort Source Codes Prompt by Description in Order Entry (F67)

Pass Entity Code to Tax Interface (F69)
Remote Order Values (F70)
Duplicate Checking for Customers (F71-F77, H88 and I11)
Create Keywords at Item Entry (F78)
Auto-Generate Item Keywords from Description (F79)
Include Spaces in Special Handling Edit for Maximum Characters (F80)
Display Entity Description (F84)
Allow Location Class Edit in Inventory Transaction (F86)
Include Bulk Locations in Primary Primary Availability (F87)
Include Secondary Locations in Primary Primary Availability (F88)
Track Customer History at Entity Level (F89)
Update Original Source Code for Recipient Customers (F90)
Position Cursor on Offer Field in OE/OM (F91)
Default Credit Card Authorization Number for Soft Declines (F93)
Use Credit Card Vendor Response Entity Ship Via Dollar Limits (F94)
Search Active Offers for Price (F95)
Maximum Warranty Order Amount (F97)
Maximum LTD Warranty Amount for Customer (F98)

G

Default Price Override Reason for Warranty Items (G01)
Customer Class for User Defined Field Prompting (G04)
Include Weight of all Items in Freight by Order Weight (G05)
Default Primary Location from an Item Warehouse (G06)
Hold Invoices for Multi-Recipient Orders (G07)
Default Vendor Response for Automatic Authorizations (G10)
Cancel Reason (Rejected Store Pickup Orders) (G11)
Display First Membership Order Total (G14)
Use Store File (G15)
Warehouse Replenishment Pick Worksheet Print Program (G25)
Default Offer Source Code to Order Detail Line (G28)
Include PO Estimated Charges in Receipt Cost Calculation (G29)
Populate Marketing Download Trigger File (G33)
Load Location into Pick Sequence (G34)
Download Threshold Quantity (G36)

SKU Element Description 1 (G37)
SKU Element Description 2 (G38)
SKU Element Description 3 (G39)
Default Batch for E-Commerce Orders in Error (G41)
E-Commerce Order Type (G42)
Time Limit for Suspended E-Commerce Orders (G43)
Require Entity in Item File (G44)
Auto Update Order Priority (G45)
Display "No Primary Location" Message in Returns (G46)
Consolidated Replenishment Report Program Name (G49)
Order Acknowledgement Program (G50)
Shipment Confirmation Program (G51)
Status Message for E-Commerce Partial Reserved Lines (G52)

Calculate Freight by Order Weight for N/C Orders (G68)
System Assigned Vendor Number (G70)
Price Override Reason for E-Commerce (G73)
Display Action Notes in Order Inquiry (G74)
Pending Putaway Due Date Days (G92)
Backorder Notification E-Mail Program (G95)
Soldout Notification E-Mail Program (G96)
Default Opt In/Opt Out Flag (G97)
Require Reason in CTI (G98)
Authorize Full Amount During Order Entry (G99)

H

Require Phone Number in Order Entry/Order Maintenance (H01)
Credit Card Credit Acknowledgement E-Mail Program (H08)
Hold Reason for Failed E-Commerce Maintenance Transactions (H11)
Order Maintenance Confirmation E-Mail Program (H12)
Use OROB Drop Shipping (H13)
Drop Ship Integration Values (H20)
SKU Element Defining Color (H21)
SKU Element Defining Size (H22)
SKU Element Defining Size 2 (H23)

Default Salesrep for E-Commerce Interface (H24)

Use Retail Integration (H26)

Add Accompanying Items in Order Maintenance (H28)

Default Recipient Type for E-Commerce Orders (H33)

Restrict SKU Scan by Offer (H34)

Drop Ship Lead Days (H36)

E-Mail Order Confirmations for All Orders (H51)

E-Mail Shipment Confirmations for All Orders (H52)

Return Confirmation E-Mail Program (H53)

Maximum Order Amount for E-Commerce Orders (H54)

Bypass Geographic Zone Searching in Order Entry/Order Maintenance (H55)

Refund Freight Default for Inbound Returns (H59)

Refund Additional Charge Default for Inbound Returns (H60)

Refund Handling Default for Inbound Returns (H61)

Refund Duty Default for Inbound Returns (H62)

Default Return Reason Code for Inbound Returns (H63)

Default Additional Charge Code for Inbound Returns (H64)

Default Return Disposition Code for Inbound Returns (H65)

Generate Invoice Number at Pick Gen (H80)

Source Code Auto Retrieval Value (H82)

Default Miscellaneous Source Code for Existing Customers (H83)

Default Miscellaneous Source Code for New Customers (H84)

Require Customer Class (H85)

Generate E-Commerce Customer Merge Staging Files (H86)

Exact Match Required on Company for Remote Orders (H88)

Threshold Monitor Interval (H90)

Assign Unreferenced Email (H93)

Alternate Customer Number Label Description (H95)

Use Workflow Management (H96)

Write Outbound Email to Email Repository (H99)

I

Email Presentation (I01)

Display Alternate Shipping Charges by Via Window in OM (I02)

Include Special Handling in Alternate Shipping Charges by Via (I03)

[Sell Out Set if Component is Sold Out \(I05\)](#)
[Computer Telephony Integration Type \(I06\)](#)
[Authorization Number for Authorizations Under \\$1.00 \(I08\)](#)
[Include All Customer Inquiry Triggers for Marketing Download \(I09\)](#)
[Exact Match Required on Email Address for Remote Orders \(I11\)](#)
[Generic Integration Values \(I13\)](#)
[Outbound Interface Trigger File Purge Days \(I14\)](#)
[Create Generic Item Download Trigger Records \(I15\)](#)
[Create Generic Vendor Download Trigger Records \(I16\)](#)
[Create Generic Invoice Download Trigger Records \(I17\)](#)
[Include Telephone Number in Customer Search \(I20\)](#)
[Default Vendor Item Additional Charges \(I21\)](#)
[Use Streamlined Stored Value Card Billing \(I23\)](#)
[Stored Value Card Modulus Checking Method \(I24\)](#)
[Stored Value Card Activation Pricing Method \(I25\)](#)
[Stored Value Card Activation Authorization Service \(I26\)](#)
[Stored Value Card Email Notification Program \(I30\)](#)
[Create Generic Pick Download Triggers \(I31\)](#)
[Create Generic Inventory Download Triggers \(I32\)](#)
[Include Non-Allocatable Warehouses \(I34\)](#)
[Update Primary Primary Location for Item During Receiving \(I35\)](#)
[Use Merchandise Locator \(I38\)](#)
[Merchandise Locator Distance Measurement \(I39\)](#)
[Default Search Within Radius \(I40\)](#)
[Use Activation / Reversal Batch Processing \(I50\)](#)
[Use Alternate Zone Reservation Logic \(I52\)](#)
[Automatically Display Coordinate Items in Order Entry \(I53\)](#)
[Order Control Summary Shipment Update Method \(I55\)](#)
[Delay Order API Edit \(I56\)](#)
[Default Unknown Source Code \(I58\)](#)
[Assign Drop Ship Expected Ship Date \(I59\)](#)
[Allow Manual Entry of Promotion Code \(I63\)](#)
[Exclude Sale Item When Prorating Discounts \(I65\)](#)
[Address Interface \(I67\)](#)

Address Interface User Hold Code (I68)
Download Prepaid Payment Types to E-Commerce (I69)
Stored Value Card Processing Values (I71)
Default SVC Refund Item Number (I73)
Price Override Reason for SVC Refund Item (I74)
Default Pick Generation Template for SVC Refund Processing (I75)
Minimum Item Price Eligible for Retail Pick Ticket (I76)
Batch Number for Retail Channel Orders (I78)
Use Inventory Sharing Backorder Evaluation (I80)
Use Loyalty Membership Program (I81)
Loyalty Membership Activation Notification Email Program (I82)
Loyalty Membership Deactivation Notification Program (I83)
Display Alternate Customer Cross Reference Window (I84)
Inventory Transaction Code for 'Sync' Processing (I85)
Assign Alternate Customer # (I88)
Default Customer for Customer API (I90)
Item Values (I91)
Require L/S Department (I92)
Require L/S Class (I93)
Require L/S Style (I94)
Online Auth Verification Only (I96)
Perform Address Standardization in Customer API (I99)

J

Address Validation Values (J01)
Default SKU Generator L/S Style (J04)
Auto Advance to Item Offer (J05)
Auto Advance to SKU Generator (J06)
Default Active Offers (J07)
Item Creation Values (J08)
Suppress Email Address Search (J09)
Use Generic Tax XML Interface (J10)
Use Standard Tax Calc if Tax Interface Communication Fails (J13)
Display Partial Credit Card Number in Logs (J16)
Hold Reason for Stored Value Cards with Insufficient Funds (J18)

Perform Balance Inquiry during Batch Authorizations (J19)
Perform Authorization Reversal during Deposit Processing (J20)
Retain Unused Stored Value Card Authorization After Deposit (J21)
Remove Stored Value Card Number After Activation (J22)
Capture Addresses for Invoice (J24)
Reserve from Non-Allocatable Warehouse (J25)
Disregard Soldout Controls for Non-Allocatable Warehouses (J27)
Hide Item Availability in Order Entry (J66)
Best Way Ship Via for Auto-Assignment (J67)
Automatically Create SKU Offers (J71)
Include PO Updates (J93)

K

Automatically Reprice Coupon (K02)
Capture Order/Call Disposition (K03)
Write Order Messages for Membership Rotation (K04)
Send B/O to OROB (K08)
Suppress Order Confirmations for Orders in Error (K09)
Order Broker Status Update Interval (K10)
Order Broker Due Date Threshold (K11)
Order Broker Include Ship Complete Orders (K12)
Order Broker Include Coordinate Grouped Orders (K13)
Order Broker Include Gift Orders (K14)
Order Broker Values (K15)
Use WMS Integration (K25)
Create Generic PO Download Triggers (K26)
Create Generic PO Download Trigger for PO Receipt (K27)
Create Return Download Triggers (K28)
Print Entity Image (K35)
Use Business Days When Calculating Expected Delivery Date (K38)
Warehouse Cutoff Time (K39)
Quantity Price Matrix Hierarchy Sequence # (K40)
Quantity Price Matrix Pricing (K41)
Price Override Reason for Price Matrix Customer Specials (K42)
Best Way Promotions (K44)

Price Override Reason for Promotions (K45)
OROB Account (K49)
OROB System (K50)
OROB Default Location (K51)
Credit Card Decline Email Program (K53)
Contact Us Email Program (K54)
Bypass Creation of Pick Forms during WSPS Pick Generation (K55)
OROB Default Location Code for Unfulfillable Orders (K56)
Reject Duplicate Web Orders (K64)
OROB Product Code ID (K66)
Default Location for ORCE Integration (K69)
Clear Processed Records from Customer Email Updates Table (K70)
Quote Printing Program (K73)
Quote Confirmation Email Program (K74)
Price Override Reason for Quotes (K75)
Override Freight on Quote Conversion (K76)
Membership Cancellation Email Program (K77)
Order Cancellation Email Program (K78)
Order Line Cancellation Email Program (K79)
Email Purchase Order (K80)
Generate Invoice # at Pick Gen without Address Match (K81)
Unused Pick Label Purge Days (K83)
Delay Billing Updates (K85)
Alternate ID Required for Displaying Customer Profile (K87)
Retain Backordered Lines Brokered to OROMS (K89)
Order Broker Error Batch Number (K90)
Order Type for Orders Brokered for Delivery (K91)
Order Type for Retail Pickup Orders Brokered to OROMS (K92)
Order Broker Source Code (K93)
Order Broker Ship Via (K94)
Order Broker Price Override (K95)
Sold to Email Update for Orders Brokered to OROMS (K96)
Sold to Address Update for Orders Brokered to OROMS (K97)
Order Broker Payment Type (K98)

L

Ship Complete for Orders Brokered to OROMS (L01)
Order Broker Hold Reason (Cancel) (L02)
Gift Flag for Orders Brokered to OROMS (L03)
Re-Polling for Orders Brokered to OROMS (L04)
Send Inventory by Warehouse to OROB (L06)
Cancel Reason Code to Suppress Email (L08)
Name in OROB for Point of Sale (L09)
Hold Reason for Errored Ship for Pickup Orders (L10)
Send Tax to Tax Interface as Quote Not Invoice (L11)
Create Generic Customer Download Triggers (L12)
Deposit Service for Conditional Deposits (L13)
Order Type for Special Orders (L15)
Pay Type for Special Orders (L16)
Item Status for Suppressing Item During Item Selection (L21)
Calculate Freight for Store Pickup Orders (L32)
Store Pickup Order Type (L33)
Cross Channel Orders to Exclude in Sales Feed (L35)
Merchandise Only in Sales Feed (L36)
ORCE Customer Integration (L37)
ORCE Integration Item ID (L38)
Item for Non-Merchandise Amounts (L39)
Split Special Handling Picks (L44)
Order Receipt Print Program (L46)
Store Pickup Confirmation Email Program (L48)
ORCE Organization Descriptor (L50)
Send Profile Data to ORCE (L51)
ORCE Integration Values (L52)
Third Phone Number Type (L53)
Use External Item Image (L55)
Use Split Order (L56)
Customer Price Group Code for CPG Pricing Only (L58)
Price Override Reason Code for CPG Pricing (L59)
Payment at POS for Ship for Pickup Orders (L60)

Populate Ship Status for EmailOut XML (L61)
BOGO Grouping by Price Code or Category (L62)
Use Streamlined Allocation (L63)
FTC - Suppress Backorder Notice for Due Date Changes (L65)
Ship Via Priority for Ship To Mismatch (L71)
Use Gift Card Fraud Checking (L72)
Require Last Name/Postal Code in Customer History Request (L76)
Periodic Process History Purge Days (L77)
Preload Deposits (L78)
Reserve within PICK_IN Processing (L79)
Cancel Reason (Pick In) (L86)
Suppress Returns for Retail Pickup/Delivery (L88)
Create Separate Picks for Ship for Pickup Orders (L89)
ChannelAdvisor Order Type (L90)
ChannelAdvisor Inventory Level Default (L91)
ChannelAdvisor SKU X-Ref Offer (L92)
Bypass Customer API Edit (L93)
Send Shipment Confirmation from Billing (L98)
Display Return ID Window (L99)

M

Add Reason for No Cost PO (M04)
Use OROB Status Inquiry List Web Service (M05)
Use ORCE Loyalty (M06)
Prompt to Join Loyalty (M07)
ORCE Loyalty Card Prefix (M08)
ORCE Loyalty Card Series Sequence Number (M09)
ORCE Loyalty Registration Notification Email Program (M10)
Allow Only Single Line on Drop Ship PO (M13)
Fraud Score Cancel Reason Code (M14)
Product Classification for Fraud Scoring (M15)
Payment at POS for Store Pickup (M16)
Send Held Orders to OROB (M18)
Fraud Values (M19)
Return Disposition Code to Exclude in ORCE Sales Feed (M22)

Use CC Net Exchange Billing (M23)

Hold Days for CC Netting (M24)

Default Auth Code for CC Netting (M25)

Use ORCE Wish List (M26)

Search Promotions by Start Date in Order Entry (M27)

Generate E-Commerce Offer Tables (M29)

Use OROB for Fulfillment Assignment (M31)

Originating Location to Pass to OROB (M32)

Order Type for Delivery Orders Originating in OROMS (M33)

Use OROB for Ship for Pickup Fulfillment Assignment (M34)

Order Type for Retail Pickup Orders Originating in OROMS (M35)

Submit O/M Cancel Asynchronously (M36)

AvaTax Account (M37)

AvaTax License (M38)

ReSA RTLOG Format (M39)

Append Ecommerce Order # to PayPal Invoice ID (M40)

Enterprise Integration Values (M41)

Enterprise Integration Wait Time (M42)

OCDS Merchandise Hierarchy URL (M43)

OCDS Differential URL (M44)

OCDS Item URL (M45)

OCDS Item Location Attributes URL (M46)

OCDS Item Image URL (M47)

OCDS Initial Item Price URL (M48)

OCDS Future Available URL (M49)

RICS Outbound Service URL (M50)

OMS Default Primary Location (M51)

OCDS RMS Location Identifier (M52)

OCDS Stop Sale Indicator SLC Code (M53)

OROB Item Category Value (M54)

Default Source Code in Contact Center Order Entry (M55)

ReSA Warehouse for Non-Inventory Returns (M56)

Use Narvar Integration (M57)

Narvar Outbound Service URL (M58)

[Narvar Non-Deliverable Email Address for Shipment Confirmations \(M59\)](#)

[Narvar Track URL Prefix \(M60\)](#)

[Perform Reauthorization for Expired Authorizations \(M61\)](#)

[ORCE File Service URL \(M62\)](#)

[ORCE Import Folder Path \(M63\)](#)

[Sales Audit File Service URL \(M64\)](#)

[Sales Audit Import Folder Path \(M65\)](#)

[IDCS Enterprise Endpoint Scope \(M66\)](#)

[IDCS Enterprise Endpoint URL \(M67\)](#)

[OCDS Regular Item Price URL \(M68\)](#)

[OCDS Clearance Item Price URL \(M69\)](#)

[Send ORCE Customer ID to Narvar \(M70\)](#)

[Send ORCE Customer ID to OROB \(M71\)](#)

[ORCE Customer ID in OROB Fulfillment \(M72\)](#)

[Invoice Ship For Pickup Order Once Intransit \(M73\)](#)

[Send Payment Card Data in ReSA RTLOG \(M74\)](#)

[Alternate Order Number Prefix for Order Creation \(M76\)](#)

[Use ORPE Promotion Engine \(M77\)](#)

[Price Override Reason for ORPE Discounts \(M78\)](#)

[Use ORCE Serialized Coupons \(M79\)](#)

[ORCE Serialized Coupon Prefix Length \(M80\)](#)

[Use CaR Returns \(M81\)](#)

[Courier Pickup Message \(M82\)](#)

[Maximum Number of Eligible Return Drop-Off Locations \(M83\)](#)

[Search Distance \(in Miles\) for Eligible Return Drop-Off Locations \(M84\)](#)

[Generate Return Authorization Notifications \(M85\)](#)

[Generate Courier Pickup Notifications \(M86\)](#)

[Create RI Item Warehouse/Location Before Dedup \(M87\)](#)

4

Configuration and Administration

Configuration:

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

See also [Menu Driver Screen](#).

Administration:

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

Troubleshooting and FAQs

- [Reviewing Application Settings in the Jenasys Properties File](#)
- [Logs](#)
- [Monitoring Jobs](#)

- [Caching](#)
- [Frequently Asked Questions](#)

Document Management (My Docs)

Purpose: Use the Document Management screen to work with reports generated by Order Administration.

How are reports different from forms? Reports are listings that present summary or detail information for use by staff, while forms include specific information for a single customer, vendor, or order, and are available for distribution to the customer or vendor. For example, the Pick Unit report lists total single-line and multi-line picks generated, while each generated pick slip form includes the customer's name and address and details about the order that is shipping with the pick.

PDF files: Each report is generated as a PDF (portable document format) file, typically opened through the Adobe Reader or within a separate browser window. Certain reports are also available in spreadsheet format, so you can work with them in a spreadsheet application.

Oracle Business Intelligence Publisher report settings: Order Administration uses an integration with Oracle Business Intelligence Publisher to generate certain forms and reports. See [Oracle Business Intelligence Publisher \(BI Publisher\) Forms and Reports Settings](#) for more information on the required setup.

Custom reports: You can create and generate custom reports through Oracle Analytics Cloud. See the OMS Custom Reporting Guide on [My Oracle Support](#) (ID 2953017.1) for more information.

In this topic:

- [Document Management Screen](#)
- [Reports Available in Spreadsheet Format](#)
- [Reports Not Currently Implemented](#)
- [Reports Troubleshooting](#)

Document Management Screen

How to display this screen:

- Click the My Docs icon () in the upper right area of a screen), or select My Docs from an Admin screen (such as the About Application, [Forms Management Screen](#), [Job Management Screen](#), Commands, User Control, or System Messages screens). When you advance to the screen this way, it displays all reports generated through your user ID through any submitted job. See the fields below for information on how to filter the reports listed on this screen.
- Click the report icon () for a submitted job at the [Job Management Screen](#) (My Jobs) to display the reports generated for that particular job only.

Report Listings and Display Options

Default settings for reports available for review: When you first advance to this screen, the most recent reports submitted by your user ID are currently available for review by scrolling up or down with the right-hand scroll bar. The reports are listed in reverse chronological order (newest to oldest).

Available reports updated when you filter: When you enter or select any search criteria and then click Filter, the screen displays reports that match these criteria. A message displays if the search results are greater than 200 records: The maximum number of records was exceeded. Please refine search criteria. Showing records 1-200. Enter additional search criteria to refine your search results.

Example: The screen currently includes the most recent reports available for review in reverse chronological order (newest to oldest): 20 of these reports are in the QPRINT queue, and 5 are in the DOCUMENTS queue. When you select QPRINT from the Queue field and click Filter, the screen displays only the most recent reports in the QPRINT queue.

Available reports restricted by Rank and All job authority:

- If the All job authority option is selected for your user control record, you can review all jobs, regardless of ranking.
- If the All job authority option is not selected for your user control record, you can review forms generated by other users only if their user control Rank does not exceed yours.

Example:

User MSMITH has a Rank of 9, with All job authority selected.

User TBROWN has a Rank of 9, with All job authority unselected.

User JJONES has a Rank of 1, with All job authority selected.

Result:

- MSMITH can review reports generated by TBROWN because their Rank is the same; however, MSMITH cannot review reports generated by JJONES, because a Rank of 1 exceeds a Rank of 9.
- TBROWN cannot review reports generated by any other users, because he does not have All job authority.
- JJONES can review reports generated by all other users based on his Rank and All job authority.



Note:

Different rules control the authority to view forms and reports than the rules that affect the [Job Management Screen](#). The user's Rank does not affect authority to view jobs.

Column sort: You can sort on any column by clicking the column heading name. When you first click, the sort is in ascending alphanumeric (A-Z) or numeric (lowest to highest) order. Click again to change the sort to descending (Z-A) or numeric (highest to lowest) order.

Field	Description
Document	The program that generated the report. Click the document icon to open the report in a separate window. From this window, you can review and optionally print the report, using the standard Windows print options for your PC. Note: - The PDF icon () indicates that the report is available in PDF format. Click the icon to open the report in a portable document format application. - The spreadsheet icon () indicates that the report is available in spreadsheet format. Click the icon to open the report in a spreadsheet application. See Reports Available in Spreadsheet Format for more information. - The glasses icon () indicates that the report has already been reviewed in a prior session, by you or another user. If your user ID is assigned a Rank of 1, you can click on this icon to display a log indicating who viewed the report: Viewed By: TBROWN on 05/29/2014 10:57:30 - If you already have a separate browser window open to review another report or a form, the system does not open an additional window; instead, the previous form or report is replaced with the recently-selected report. - If you click on a document that has not yet finished generating, the system displays an unexpected error window. When you close this window, the system displays an Are you sure you want to leave this page window; select leave page to return to the Document Management screen. Filter options: - to display reports by document name: enter a full or partial document name and click OK. - to display reports regardless of document name: if you have previously entered a full or partial document name, clear the entry and click OK.
Job name	The job that generated the report. Filter options: - to display reports by job name: enter a full or partial job name and click OK. - to display reports regardless of job name: if you have previously entered a full or partial job name, clear the entry and click OK.
Output queue	The output queue where the report is saved. The default output queue is QPRINT for some reports and DOCUMENTS for others. See Reports Troubleshooting for more information. Filter options: - to display reports for a single output queue: select the output queue from the drop-down list and click OK to display reports in that queue. - to display reports regardless of output queue: if you have previously selected an output queue, clear the selection and click OK.

Field	Description
Pages/File Size	The size of the report file in kilobytes; for example: 10 KB. Any reports generated using a tool other than Oracle Business Intelligence Publisher display the report's length in pages; for example: 10 Page(s). Note: If you advance to the Document Management screen before the job has finished generating the report, the value indicated here might not be correct until the job completes.
Date	The date and time when the report was generated in MM/DD/YY-HH:MM:SS. Filter options: - to display reports generated on or after a specific date: click the calendar icon () , select a date, and then click OK. - to display reports generated on the current date: click the calendar icon, select Today from the bottom of the calendar, and click OK. - to display reports regardless of the date generated: if you have previously selected a date, clear the date and click OK.
User name	The user ID of the person who generated the report. Your user ID defaults. Submitted through web service request? When you use the CWProcessIn message or the ProcessIn message to start a periodic process, the report is listed under your default user set up during installation. Contact your cloud administrator or system administrator to confirm the user ID of the default user, and see Using the CWProcessIn Message to Start a Periodic Process or Using the ProcessIn REST Message to Start a Periodic Process in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) for background. Filter options: - to display reports generated by another user: enter a complete, valid user ID and click OK. - to display reports regardless of the user who generated them: clear the current entry in this field and click OK.
Status	The only status currently implemented is READY (the report is ready for review).
Job	A system-assigned identification number to track the job generating the report. When you use the ProcessIn Message or the CWProcessIn Message to start a job with the wait_for_completion tag set to Y, this is the job number returned in the response message. Filter options: - to display reports for a particular job number: enter a valid job number and click OK. - to display reports regardless of job number: if you have previously entered a job number, clear the entry and click OK.

Document Management Screen Options

Option	Procedure
Review, and optionally print, a generated report	Click the document icon to open the report in a separate window. From this window, you can print the report using the printers currently available to your local PC. Note: The system keeps a single additional window open for you to review a report or a form. If you already had a report or form open in the additional window, the system replaces the document previously displayed with the report you have just selected. Reopen the additional window to review the recently selected report.
Change which reports are displayed on the screen	
Restrict or expand the list of displayed reports based on one of the available column headings	See the Report Listings and Display Options for information on how to filter the reports displayed based on various criteria.
Refresh data listed on the screen	Click Refresh. Newly generated reports are added to the screen in READY status as they are generated.
Sort by column	Click the column heading name. When you first click, the sort is in ascending alphanumeric (A-Z) or numeric (lowest to highest) order. Click again to change the sort to descending (Z-A) or numeric (highest to lowest) order.
Delete an individual report	Select the checkbox to the left of a report and click Delete.
Display additional information about a report or advance to a different screen	If you advance to a different screen and then return, your filter entries are not retained. For example, if you are currently filtering on a specific queue, and you advance to the Job Management (My Jobs) screen and return, the Queue column no longer filters on that queue.
Display information about Order Administration	Select About.
Advance to the Forms Management Screen screen	Select My Forms.
Advance to the Job Management Screen	Select My Jobs.
Advance to the Advanced Commands screen	Select Advanced Commands. This option is available only for users that have authority to the Advanced Commands option.
Return to the previous screen	Select Exit.

Reports Available in Spreadsheet Format

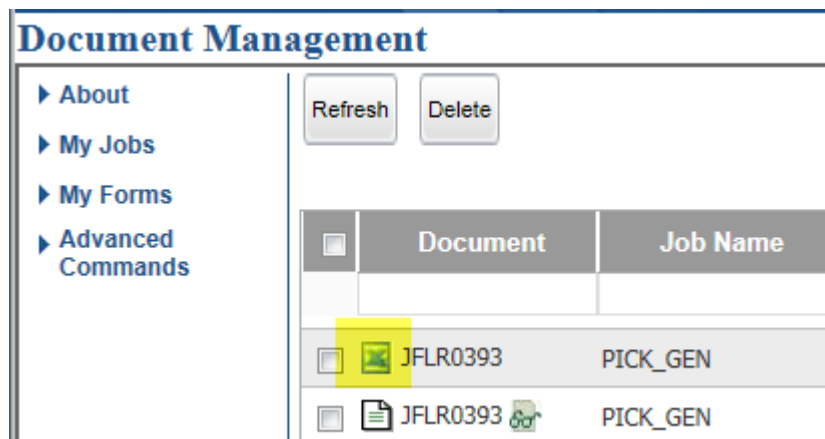
Purpose: Certain reports are available as spreadsheet files, which you can easily open in a spreadsheet application and then work with the data to suit your business requirements. Reports available in spreadsheet format are:

Report	Fast Path
Item Purchase and Sales Aging Report	LIPS

Report	Fast Path
Item Stock Status Report	MISA
Note: Only the sort by Category \$ Sold Ascending and by Item \$ Sold Ascending are available in spreadsheet format, but you can use your spreadsheet application to sort the data as needed.	
Item Sales Analysis Report	MISS
Note: Only the sort by Item Warehouse is available in spreadsheet format, but you can use your spreadsheet application to sort the data as needed.	
Refund Due List:	MRDU
Refund Due List by Type Refund Due List by Order #	
Backorder Report by Descending Dollars by Division/ Warehouse	PBOD
Note: This is the only version of the backorder report by descending dollars that is available in spreadsheet format, but since the data is the same in other versions, you can use your spreadsheet application to sort the data as needed.	
Backorder Report by Item with SKU Details	PBOR
Backorder Report by Warehouse	PBOR
Backorder Report by Warehouse with SKU Details	PBOR
Backorder Report by Vendor with SKU Details	PBOR
Backorder Report by Vendor/SKU/PO	PBOR
Carryover Report	PCOR
Deposit History Detail Report	PDHD
Deposit History Summary Report	PDHS
Sales Journal by Division	PDSJ
Standard Sales Journal	PDSJ
Order Type Summary by Delivery Type Report	PDTS
Exchange Reason Report	PERR
Return Reason Report	PERR
PO Expected Delivery Report	PEXD
The spreadsheet format is available regardless of whether you select the Print SKU detail option when you generate the report.	
Held Order by Reason Code Report	PHOR
Inventory Transaction History Report	PITH
Operations Control Report	POCT
Promotion Analysis Report	POPA
Open Prepaid Order List	POPP

Report	Fast Path
Product Performance Report (Ordered Totals)	PPPR
Note: Only the sort by ascending items or by descending total dollars are available in spreadsheet format, but you can use your spreadsheet application to sort the data as needed.	
Product Performance Report (Shipped Totals)	PPPR
Note: Only the sort by ascending items or by descending total dollars are available in spreadsheet format, but you can use your spreadsheet application to sort the data as needed.	
Processed Refund Register	PPRR
Price Override Reason Report	PROR
Sales Journal Summary by Period	PSJM
Sales Journal Summary by Invoice Date	
Sales Journal Summary by Entity/Offer	
Sales Journal by Pay Type	PSJP
Source Shipped Report	PSSR
State Tax Detail Report	PSTD
State Tax Report	PSTX
User Authority Change Report	PUSA
Password Change Report	PUSA
Unconfirmed Deposits Listing Report	SDEP
Auto Deposit Confirmation Report	
Order Orchestration Aging Report	WOBR
Cart/Bin Batch Picking Pullsheet	WSPS
Picking Pullsheet	
Batch Pull Sheet Item Summary Report	
Sales Journal Summary by Order Type	N/A (generated through SLSSMOT periodic function)

Opening the file as a spreadsheet: The spreadsheet icon () next to the report indicates that the report is available in spreadsheet format (such as the FLR0393 report in the image below):



Click the spreadsheet icon to work with the report in your default spreadsheet application. A window opens asking if you would like to open or save the selected file.

Things to note:

- **Formatting:** When you initially open the report in your spreadsheet application, the data might not be formatted to your preferences. For example, certain columns might appear too narrow to display their full contents. Also, alphanumeric fields that can also include numeric values (for example, the item code) might be in cells that are formatted as numeric data. In this situation, changing the cell properties to text can correct the alignment.
- **Decimal and Thousand Separators:** Your spreadsheet application may override any decimal and thousand separator settings for numbers with its own number separators. Change the settings in the spreadsheet application to the separators you wish to use.
- **Totals:** For the most part, totals and subtotals that appear on the PDF version of the report are not included in the spreadsheet file. You can use your spreadsheet application to insert rows for totals or subtotals and perform any required calculations.
- **Blank columns and rows:** Columns and rows that can include data are included in the spreadsheet file, even if there is no relevant information for the column or row in your report results. For example, when a report includes a separate column to flag order lines that have VAT charges, this column is blank in your spreadsheet file if you do not charge VAT in your company.
- **Negative amounts:** For negative amounts and quantities, the minus sign is on the left side in the spreadsheet file (rather than the right side, as it appears in the PDF version) so that your spreadsheet application can correctly render the negative values and include them in calculations.
- **Page breaks and column headings:** Page breaks in the PDF version of the report are not represented in the spreadsheet file as repeated column headings unless they also introduce a new grouping of data. For example, the sales journals are each broken out into separate groupings, such as by invoice date and pay type, so in these reports the column headings repeat for each grouping in the spreadsheet file.
- **Automatic backup of spreadsheet files:** If you leave a spreadsheet file open for a period without saving it, your spreadsheet application may display an error message. This error occurs because the spreadsheet application attempts to back up working files periodically, and the spreadsheet file name includes invalid characters. To avoid seeing this error message, save the spreadsheet file using a logical, valid file name soon after opening it.
- **Deletion of spreadsheet files:** When you remove the report at the Document Management screen, the system deletes the selected spreadsheet file only; when you remove the job at the Job Management screen, the system deletes both the PDF file and the spreadsheet file.

Opening a spreadsheet file for a language other than English: When you use a spreadsheet application such as Microsoft Excel to open a spreadsheet file in a language other than English, the content might not display correctly. To open the file and use language-specific encoding, follow a process such as the following.

**Note:**

The exact steps vary depending on the spreadsheet application you use and the version of the application.

1. Download and save the CSV file.
2. Open a blank workbook in the spreadsheet application.
3. At the top of the screen, select Data > From Text or Data > Get External Data > From Text.
4. Locate the downloaded file and select Import.
5. In Step 1 of the Text Import wizard, select the Delimited option and in the File origin, select the correct language code. For example, for French, select 65001:Unicode(UTF-8). Click Next.
6. In Step 2, select Comma from the delimiters section. The Text qualifier field should then show a double quote. Click Next.
 - If the wizard prompts for where you want to put the data, click any cell on the blank worksheet to determine where the data should go.
 - If the wizard prompts for a column date format, select General.
 - If the Import Data window prompts for where to import the data, select the Existing worksheet, accept the default entry, and click OK.
7. Click Finish to import the data.

Reports Not Currently Implemented

Order Administration uses an integration with Oracle Business Intelligence Publisher to generate certain forms and reports. As part of the transition to Oracle Business Intelligence Publisher, if a report has not yet been converted to Oracle Business Intelligence Publisher, instead of generating the report the system will generate a generic document with the following information, where REPORT is the name of the generated report:

The requested document is not currently implemented: REPORT

The following reports are not currently implemented.

Report	Fast Path or Function
CPG Item/SKU Exclusions Upload Error Records Report	CPGIXUP periodic function
Price Code Upload Errors Report	PCUPLD periodic function
Promotion Upload Error Records Report	WPRO or PRMOUPL periodic function
Purged Order List	PURGEOR periodic function
Quote Form	OEOM
Store Update Errors Report	STRUPLD periodic function
Reset Audit Log for Quantity Printed	MRPC

Report	Fast Path or Function
Reset Audit Log for Quantity Reserved	MRQR
Reset Audit Log for Quantity on Backorder	MRBO
Reset Audit Log for Quantity On Hand	MRIW
Reset Audit Log for SKU Quantities	MRSO
Sales Rep Update Errors Report	SLSUPLD periodic function
Unmatched Email Status Report	EMAILUD periodic function

Reports Troubleshooting

Some possible troubleshooting questions and answers are:

Question	Possible Answer(s)
How is the system determining the date format for dates that display on reports?	Reports and forms generated using Oracle Business Intelligence Publisher display the date in the date format defined in Oracle Business Intelligence Publisher for the locale in the Company table. Since the only locale supported is English, the date format for reports generated using Oracle Business Intelligence Publisher is always MM/DD/YY. Reports and forms that are not generated using Oracle Business Intelligence Publisher, display the date in the date format defined for the company. Note: Reports that are not associated with a company display the date in the date format defined for the DEFAULT_DATE_FORMAT property.
How is the system determining the decimal and thousand separator for numbers that display on reports?	Reports and forms generated using Oracle Business Intelligence Publisher use the number format defined in Oracle Business Intelligence Publisher for the locale in the Company table. Since the only locale supported is English, the decimal separator is always a period (.) and the thousand separator is always a comma (,). Reports and forms that are not generated using Oracle Business Intelligence Publisher display numbers using the characters defined in the DECIMAL_SEPARATOR and THOUSAND_SEPARATOR properties.
Are reports automatically deleted?	Reports older than the <i>oms.job.purge.retain.days</i> property in Working with Admin Properties (CPRP) are deleted, along with the related jobs, when you restart Order Administration.
Why are the outer portions of the page cut off when I print a report?	Make sure that the Page scaling option in the Print dialog box is set to Fit to printer margins or Shrink to fit when printing a form to prevent information on the edge of the page from being cut off.

Question	Possible Answer(s)
Why doesn't a new window open when I click the name of a report at the Document Management Screen ?	The system keeps a single additional window open for you to review a form or a report. If you already had a form or report open in the additional window, the system replaces the document previously displayed with the report you have just selected. Reopen the additional window to review the recently selected report.
I removed a job at the Job Management Screen and now I cannot find the report. Why?	Deleting a job automatically deletes the reports generated through that job.
Why wasn't a job deleted when I removed all of its generated reports at the Document Management Screen ?	Deleting all generated reports for a job does not automatically delete the job. Use the Job Management Screen (My Jobs) to delete the job.
How can I find out about the data on a report?	Use the Reports Guide find a description of the report and a report sample.
Why is there a single line of detail information on page two of a report, and then the third page of the report is labelled "Page 2"?	Contact your Order Administration representative if this issue occurs on one of your generated reports.
Why does the Document Management Screen indicate that a report is 1 page long, while the report is actually longer?	If you advance to the Document Management Screen while the report is still being generated, the number of pages indicated at the screen might be incorrect until the job completes.
How can I improve the legibility of reports on the screen?	If some reports are not displayed clearly, you can try setting the Smooth Text option (under Preferences > Page Display in your PDF reader, such as Adobe Acrobat) to For Laptop/LCD screens.

Forms Management (My Forms)

Purpose: Use the Forms Management screen to work with personalized forms generated by Order Administration.

How are forms different from reports? Forms differ from regular reports (available for review through the [Document Management Screen](#)) in that each generated form includes specific information for a single customer, vendor, or order, and is available for distribution to the customer or vendor. For example, each generated pick slip form includes the customer's name and address and details about the items that are shipping with the pick. Reports are listings that present summary or detail information for use by staff.

PDF files: Each form is generated as a PDF (portable document format) file which you can open in a separate window. Each PDF file can contain one or more individual forms. For example, when you generate pick slips, the system might produce a single PDF file containing all the pick slips generated at that time.

If there are no records eligible for forms when you submit a job, the system generates a blank (empty) PDF file. This might occur if, for example, you generate backorder cards a second time on the same day; in this situation, the first submitted job generated all eligible backorder cards, so the PDF generated the second time is blank.

Graphical or non-graphical? There are standard print programs available for each form. Some forms are available in a graphical format, including field labels and other graphical

elements, such as a company logo, as well a simpler, non-graphical format consisting of text only. For example, you might choose a non-graphical format if you use pre-printed forms. The information on the form is the same regardless of whether you use the graphical or non-graphical format.

You can also use a unique print program if you require a form laid out differently from the standard. Contact your Order Administration representative if you need to develop a unique print program for a form.

In this topic:

- [Forms Setup](#)
- [Specify the Maximum Number of Pick Slips Per Spool File](#)
- [Set up Related System Control Values](#)
- [Create Image Files for Company or Entity Logos \(Graphical Forms\)](#)
- [Forms Properties](#)
 - [Form Naming Conventions](#)
 - [Forms Troubleshooting](#)
 - [Forms Summary Table](#)
 - [Forms Management Screen](#)

Forms Setup

Oracle Business Intelligence Publisher (BI Publisher) Forms and Reports Settings

Order Administration uses an integration with Oracle Business Intelligence Publisher to generate certain forms and reports.

In order for the integration to work, you must complete the following setup.

Oracle Business Intelligence Publisher Properties

The following properties are in the [Working with Admin Properties \(CPRP\)](#) menu option.

Property Name	Description
BI_BYPASS_CACHE_ENABLE	Defines whether the system bypasses caching for reports generated using Oracle Business Intelligence Publisher. true = Bypass caching for reports generated using Oracle Business Intelligence Publisher. false = Cache reports generated using Oracle Business Intelligence Publisher.
BI_REST_REPORTS_FOLDER	The location in Oracle Analytics Cloud where Order Administration reports are stored. Should be set to OMSCS/Reports/.

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

Date Format on Reports and Forms

Reports and forms generated using Oracle Business Intelligence Publisher display the date in the date format defined in Oracle Business Intelligence Publisher for the locale in the Company table. Since the only locale supported is English, the date format for reports generated using Oracle Business Intelligence Publisher is always MM/DD/YY.

Reports and forms that are not generated using Oracle Business Intelligence Publisher, display the date in the date format defined for the company.

**Note:**

Reports that are not associated with a company display the date in the date format defined for the `DEFAULT_DATE_FORMAT` property.

Decimal and Thousand Separator on Reports and Forms

Reports and forms generated using Oracle Business Intelligence Publisher use the number format defined in Oracle Business Intelligence Publisher for the locale in the Company table. Since the only locale supported is English, the decimal separator is always a period (.) and the thousand separator is always a comma (,).

Reports and forms that are not generated using Oracle Business Intelligence Publisher display numbers using the characters defined in the `DECIMAL_SEPARATOR` and `THOUSAND_SEPARATOR` properties.

Specify the Maximum Number of Pick Slips Per Spool File

The `PICKS_IN_SPOOL_FILE` setting in [Working with Admin Properties \(CPRP\)](#) indicates the maximum number of pick slips in a single PDF document. The system continues to break pick slips into separate PDF documents using the criteria outlined under [Sorting Pick Slips into Separate PDF Documents](#); however, if the number of pick slips in a PDF document reaches the number defined in the `PICKS_IN_SPOOL_FILE` setting, the system creates a new PDF document.

**Note:**

The system uses the `PICKS_IN_SPOOL_FILE` setting when printing pick slips through [Streamlined Pick Slip Generation \(WSPS\)](#) and [Reprinting and Voiding Pick Slips \(WVRP or WSVP\)](#). Also, the system uses this setting when printing [Gift Acknowledgements](#).

Working with the pick slip form: Once the system finishes processing one pick slip PDF document, you can open and print the pick slips in the document using the [Forms Management Screen](#); you do not have to wait until all of the PDF documents for the pick slip generation run have generated.

When printing pick slips, the system includes a PDF document sort number in the name of the document generated for the pick slip. For example, if the system generates two pick slip PDF documents for warehouse 1, ship via priority 5, the system names the documents `PICKG.ALINCOLN.20110804.103001456_001.PDF` and `PICKG.ALINCOLN.20110804.103001456_002.PDF`, where `PICKG` is the name of the print program, `ALINCOLN` is the user ID of the person who generated the pick slips, `20110804.103001456` is the date and time stamp, and `001` and `002` is the PDF document sort number. See [Form Naming Conventions](#) for more information.

Recommended setting: The recommended setting is 250 picks. The system also uses 250 as the default value if this setting is blank in [Working with Customer Properties \(PROP\)](#).

Example: When the `PICKS_IN_SPOOL_FILE` setting is 600, the system creates the following PDF documents for a pick slip generation run:

- 50 pick slips for warehouse 1, ship via priority 1
(`PICKG.ALINCOLN.20110804.103000123_001.PDF`)

- 300 pick slips for warehouse 1, ship via priority 5
(**PICKG.ALINCOLN.20110804.103001456_001.PDF**)
- 510 pick slips for warehouse 1, ship via priority 9
(**PICKG.ALINCOLN.20110804.103003789_001.PDF**)
- 75 pick slips for warehouse 2, ship via priority 1
(**PICKG.ALINCOLN.20110804.103006912_001.PDF**)
- 225 pick slips for warehouse 2, ship via priority 5
(**PICKG.ALINCOLN.20110804.103007134_001.PDF**)
- 25 pick slips for warehouse 2, ship via priority 9
(**PICKG.ALINCOLN.20110804.103008112_001.PDF**)

When the PICKS_IN_SPOOL_FILE setting is 250, the system creates the following PDF documents for the same pick slip generation run:

- 50 pick slips for warehouse 1, ship via priority 1
(**PICKG.ALINCOLN.20110804.103000123_001.PDF**)
- 250 pick slips for warehouse 1, ship via priority 5
(**PICKG.ALINCOLN.20110804.103001456_001.PDF**)
- 50 pick slips for warehouse 1, ship via priority 5
(**PICKG.ALINCOLN.20110804.103001456_002.PDF**)
- 250 pick slips for warehouse 1, ship via priority 9
(**PICKG.ALINCOLN.20110804.103003789_001.PDF**)
- 250 pick slips for warehouse 1, ship via priority 9
(**PICKG.ALINCOLN.20110804.103003789_002.PDF**)
- 10 pick slips for warehouse 1, ship via priority 9
(**PICKG.ALINCOLN.20110804.103003789_003.PDF**)
- 75 pick slips for warehouse 2, ship via priority 1
(**PICKG.ALINCOLN.20110804.103006912_001.PDF**)
- 225 pick slips for warehouse 2, ship via priority 5
(**PICKG.ALINCOLN.20110804.103007134_001.PDF**)
- 25 pick slips for warehouse 2, ship via priority 9
(**PICKG.ALINCOLN.20110804.103008112_001.PDF**)

Notice that the system creates multiple PDF documents for pick slips in warehouse 1, ship via priority 5 and for pick slips in warehouse 1, ship via priority 9, based on 250 in the PICKS_IN_SPOOL_FILE setting.

Set up Related System Control Values

You need to specify the program name for each form in order to generate the form. See the [Forms Summary Table](#) for a listing of forms and the standard print programs for each.

You can also use a unique print program if you require a form laid out differently from the standard. Contact your Order Administration representative if you need to develop a unique print program for a form.

Create Image Files for Company or Entity Logos (Graphical Forms)

**Note:**

Important: Company and entity logos on forms are not currently implemented.

If you use a standard graphical print program for a form, you can point to an image of your company logo to include on the form. The image must be in JPG format, and you need to set up a separate image for each form in each company. Optionally, you can set up images at the entity logo instead of the company level, which prints on selected forms. See [Setting Up Company Logos for Forms](#) for configuration instructions.

Forms Properties

The properties assigned to the Forms group in [Working with Customer Properties \(PROP\)](#) control whether certain information prints on certain forms.

For example, these settings control whether to print a barcode on the pick slip. See [Forms Property Settings](#) for more information.

Form Naming Conventions

The system uses the print program, job date and time stamp, and the user ID of the person who generates the forms to name the PDF files.

For example, a file named PURCHORDG.SBROWN.20110214.123456.pdf indicates that the file:

- contains graphical purchase orders (PURCHORDG)
- was generated by the user SBROWN
- was generated on June 30, 2011, at 12:34:56 (20110630.123456)

Additional form naming information: Certain print programs include additional parameters in the naming conventions:

- **Backorder notices:** File names for backorder notices indicate which notices are included in the file. For example, a file named BOCARDSSECOND.SBROWN.20110214.123456.pdf contains second notices.
- **Soldout notices:** File names for soldout notifications include the three-letter country code for the sold-to customer's address. For example, a file named SOLDOUTCAN.SBROWN.20110214.123456.pdf contains soldout notifications for sold-to customers who live in Canada.
- **Gift Acknowledgements:** The system uses the print program, the user ID of the person who started the background jobs, the job date and time stamp, and the document sort number as the name the gift acknowledgement PDF file. For example, a file named GIFTACKG.SBROWN.20110828.163639681_002.pdf indicates this is a gift acknowledgement PDF document generated by user SBROWN on August 28, 2011 and the document is the second document for a specific gift acknowledgement sort. Note: The user ID of the person who started the background jobs may not be the user ID of the person who generated pick slips or billed the order associated with the gift acknowledgement.
- **Order Receipts:** The system uses the print program, the order number and ship-to number (separated by a hyphen), the user ID of the person who generated the receipt, and a date and time stamp. For example, a file named ORDERRECG-10204-1.TBROWN.20110506.164303184.pdf indicates that this is an order receipt generated with the [Order Receipt Print Program \(L46\)](#) set to

ORDERRECG, for order 10204, ship-to 1, by user TBROWN, on May 6, 2011, at approximately 4:43 p.m.

- **Pick slips:** The system uses the print program, the user ID of the person who generated pick slips, the job date and time stamp, and the document sort number as the name of the pick slip PDF document. For example, a file named PICKG.TBROWN.20110804.103001456_002.PDF indicates this is a pick slip PDF document generated by user TBROWN on August 4, 2011 and the document is the second document for a specific pick sort, such as pick slips for warehouse 1 and ship via priority 5. See [Sorting Pick Slips into Separate PDF Documents](#) for more information on how the system breaks pick slips into separate spool files. See [Specify the Maximum Number of Pick Slips Per Spool File](#) for more information on how the system determines the maximum number of pick slips in a spool file.

Forms Troubleshooting

Some possible troubleshooting questions and answers are:

Question	Possible Answer(s)
How is the system determining the date format for dates that display on forms?	Reports and forms generated using Oracle Business Intelligence Publisher display the date in the date format defined in Oracle Business Intelligence Publisher for the locale in the Company table. Since the only locale supported is English, the date format for reports generated using Oracle Business Intelligence Publisher is always MM/DD/YY. Reports and forms that are not generated using Oracle Business Intelligence Publisher, display the date in the date format defined for the company. Note: Reports that are not associated with a company display the date in the date format defined for the DEFAULT_DATE_FORMAT property.
How is the system determining the decimal and thousand separator for numbers that display on forms?	Reports and forms generated using Oracle Business Intelligence Publisher use the number format defined in Oracle Business Intelligence Publisher for the locale in the Company table. Since the only locale supported is English, the decimal separator is always a period (.) and the thousand separator is always a comma (,). Reports and forms that are not generated using Oracle Business Intelligence Publisher display numbers using the characters defined in the DECIMAL_SEPARATOR and THOUSAND_SEPARATOR properties.
Why is the system generating a blank (empty) PDF file?	If there are no records eligible for forms when you submit a job, the system generates a blank (empty) PDF file. This might occur if, for example, you generate backorder cards a second time on the same day; in this situation, the first submitted job generated all eligible backorder cards so the PDF generated the second time is blank.
Are forms automatically deleted?	Forms older than the oms.job.purge.retain.days property in Working with Admin Properties (CPRP) are deleted when you restart Order Administration.

Question	Possible Answer(s)
Why are the outer portions of the page cut off when I print a form?	- Set the page magnification to 100%. You can change the page magnification by clicking the arrow next to the Zoom percent or by selecting View > Zoom To. - When you select to print, make sure that the Page scaling option in the Print window is set to None. All other forms: Make sure that the Page scaling option in the Print dialog box is set to Fit to printer margins when printing a form to prevent information on the edge of the page from being cut off.
Why isn't the company logo printing on the form?	Confirm that the image has been set up using the correct size, file name, and location, as described under Create Image Files for Company or Entity Logos (Graphical Forms) . Also, if you have specified to print the entity logo rather than the company logo, then you must create and name an entity logo for each entity in order for any logo to print on a graphical form that uses the logo. See Setting Up Company Logos for Forms for more information.
How can I verify where the data on the form is coming from?	The data comes from the related files for the customer, order, vendor, or bill-to account.
Why doesn't a new window open when I click the name of a form at the Forms Management Screen ?	The system keeps a single additional window open for you to review a form or a report. If you already had a form or report open in the additional window, the system replaces the document previously displayed with the form you have just selected. Reopen the additional window to review the recently selected form.

Forms Summary Table

You use a system control value to indicate the print program to use for each form type. For each form type, the following table lists each of these system control values and the standard print program(s), and provides links to form samples and descriptions.

Form	System Control Value	Standard Print Program(s)	Form Description and Sample(s)
Backorder Cards	Backorder Card Print Program (D04)	BOCARDS	Backorder Card
Customer Invoices	Order Receipt Print Program (L46)	ORDERRECG (graphical)	Order Receipt
Drop Ship Documents	Drop Ship Pick Print Program (E92)	PICKG (graphical)	Drop Ship Pick Slip/Invoice
Gift Acknowledgements	Gift Order Acknowledgement Print Program (B90)	GIFTACKG (graphical)	Gift Acknowledgement
Order Receipt	Order Receipt Print Program (L46)	ORDERRECG (graphical)	Order Receipt
Pick Documents	Pick Printing Program (C37)	PICKG or PICKDBG (graphical)	Pick Slip
Purchase Orders	PO Print Program (C64) and PO Print Program for PO Print in PO Sequence (C76)	PURCHORDG (graphical)	Purchase Order

Form	System Control Value	Standard Print Program(s)	Form Description and Sample(s)
Refund Checks	Refund Check Print Program (D23)	REFCHECK (non-graphical) REFCHECKG (graphical)	Refund Check
Soldout Notices	Soldout Notification Print Program (E75)	SOLDOUT	Soldout Notification Card
Quotes	Quote Printing Program (K73)	QUOTE (graphical) QUOTE (non-graphical)	Quote Form

Forms Management Screen

How to display this screen: Click the My Forms icon ( in the upper right area of a screen), or select My Forms from an Admin screen (such as the About Application, [Document Management Screen](#), [Job Management Screen](#), Commands, User Control, or System Messages screens)

Information on this screen:

- Form: Click the document icon next to the form to open the form in a separate window. From this window, you can review and print the form, using the standard Windows print options for your PC. Once someone has viewed the form, or the form was automatically sent to a printer, the screen displays an eyeglass icon () next to the form name. If you click on this icon, the system displays a log indicating who viewed the report: Viewed By: TBROWN on 11/29/2015 10:57:30

Note:

If you already have a separate browser window open to review another form or a report, the system does not open an additional window; instead, the previous form or report is replaced with the recently-selected form.

For more information: See [Form Naming Conventions](#) for additional information on form names.

If no forms display on the screen: Forms older than the `oms.job.purge.retain.days` property in [Working with Admin Properties \(CPRP\)](#) are deleted when you restart Order Administration.

Form Listings and Display Options

Default settings for forms available for review: When you first advance to this screen, up to 200 forms submitted by your user ID are currently available for review by scrolling up or down with the right-hand scroll bar. The forms are listed in reverse chronological order (newest to oldest). A message displays if more than 200 records are available for review: The maximum number of records was exceeded. Please refine search criteria. Showing records 1-200.

Available forms updated when you filter: When you enter or select any search criteria and then click OK, the screen displays up to 200 forms that match these criteria.

Example: The screen currently includes 200 forms available for review in reverse chronological order (newest to oldest): 180 of these forms are in the Pick Documents folder, and 20 are in the Drop Ship Documents folder. When you select Pick Documents from the Output folder field and click Filter, the screen displays up to 200 forms in the Pick Documents folder.

Available forms restricted by Rank and All job authority:

- If the All job authority option is selected for your user control record, you can review all jobs, regardless of ranking.
- If the All job authority option is not selected for your user control record, you can review forms generated by other users only if their user control Rank does not exceed yours.

Example:

Users JJONES has a Rank of 9, with All job authority selected.

User TBROWN has a Rank of 9, with All job authority unselected.

User BWILLIAMS has a Rank of 1, with All job authority selected.

Result:

- JJONES can review forms generated by WBLAKE because their Rank is the same; however, JKEATS cannot review forms generated by RBROWNING, because a Rank of 1 exceeds a Rank of 9.
- TBROWN cannot review forms generated by any other users, because he does not have All job authority.
- BWILLIAMS can review forms generated by all other users based on his Rank and All job authority.



Note:

Different rules control the authority to view forms and reports than the rules that affect the [Job Management Screen](#). The user's Rank does not affect authority to view jobs.

Column sort: You can sort on any column by clicking the column heading name. When you first click, the sort is in ascending alphanumeric (A-Z) or numeric (lowest to highest) order. Click again to change the sort to descending (Z-A) or numeric (highest to lowest) order.

Field	Description
Form	The name of the file containing the form. See Form Naming Conventions for a discussion. Filter options: • to display forms based on form name: enter a full or partial form name and click OK. • to display forms regardless of name: if you have previously entered a form name, clear the entry and click OK.
File size	The size, in bytes, of the PDF file containing the form. Display-only.

Field	Description
Date	The date and time when the form was generated. Filter options: - to display forms generated on or after a specific date: click the calendar icon () , select a date, and then click OK. - to display forms generated on the current date: click the calendar icon, select Today from the bottom of the calendar, and click OK. - to display forms regardless of the date generated: if you have previously selected a date, clear the date and click OK.
User name	The user ID of the person who generated the form. Your user ID defaults. Submitted through web service request? When you use the CWProcessIn message or the ProcessIn message to start a periodic process, the form is listed under the default user set up during installation. Contact your cloud administrator or system administrator to confirm the user ID of the default user, and see Using the CWProcessIn Message to Start a Periodic Process or Using the ProcessIn REST Message to Start a Periodic Process for background. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Filter options: - to display forms generated by another user: enter a complete, valid user ID and click OK. - to display forms regardless of the user who generated them: clear the current entry in this field and click OK.

Form Management Screen Options

Option	Procedure
Review, and optionally print, a generated form	Click the document icon next to the file name to open the form in a separate window. From this window, you can print the form using the standard Windows options and printers currently available to your local PC. Note: The system keeps a single additional window open for you to review a form or a report. If you already had a form or report open in the additional window, the system replaces the document previously displayed with the form you have just selected. Reopen the additional window to review the recently selected form.
Change which forms are displayed on the screen	
Restrict or expand the list of displayed forms based on one of the available column headings	See the Form Listings and Display Options for information on how to filter the forms displayed based on various criteria.
Refresh data listed on the screen	Click Refresh. Newly generated forms are added to the screen as they are generated.
Sort by column	Click the column heading name. When you first click, the sort is in ascending alphanumeric (A-Z) or numeric (lowest to highest) order. Click again to change the sort to descending (Z-A) or numeric (highest to lowest) order.

Option	Procedure
Delete an individual form	Select the checkbox to the left of a form and click Delete.
Display additional information about a form or advance to a different screen	If you advance to a different screen and then return, your filter entries are not retained. For example, if you are currently filtering on a specific output folder, and you advance to the Job Management (My Jobs) screen and return, the Output folder column no longer filters on that folder.
Display information about Order Administration	Select About.
Advance to the Document Management Screen screen	Select My Docs.
Advance to the Job Management Screen	Select My Jobs.
Advance to the Advanced Commands screen	Select Advanced commands. This option is available only for users that have authority to the Advanced Commands option.
Return to the previous screen	Select Exit.

Job Management (My Jobs)

Purpose: Use the Job Management screen to work with submitted jobs that have been processed, are currently processing, or are waiting to be processed. The jobs listed at this screen include each interactive session for the user.

This topic also discusses options you can use to review the jobs currently running and correct a job's status if it is inconsistent.

In this topic:

- [Job Management Screen](#)
- [Job Management Screen Options](#)
- [Jobs Troubleshooting](#)

For more information: See:

- [Display Active Batch Jobs \(DABJ\)](#)
- [Which Jobs are Active Batch Jobs?](#)
- [If a Batch Job is not on the Display Active Batch Jobs Screen](#)
- [Display Active Batch Jobs Screen](#)
- [Display Job History \(DJHY\)](#)
- [Display Job History Screen](#)

Job Management Screen

How to display this screen: Click the My Jobs icon () in the upper right area of a screen), or select My Jobs from an Admin screen (such as the About

Application, [Forms Management Screen](#), [Document Management Screen](#), Commands, User Control, or System Messages screens). When you advance to the screen this way, it displays all jobs generated through your user ID. See the field descriptions and screen options below for information on how to filter the jobs listed on this screen.

Column sort: You can sort on any column by clicking the column heading name. When you first click, the sort is in ascending alphanumeric (A-Z) or numeric (lowest to highest) order. Click again to change the sort to descending (Z-A) or numeric (highest to lowest) order.

Information on this screen:

Field	Description
Output Queue	Provides the option for you to switch the job queue where one or more jobs should run. The system-delivered job queues are: • QBATCH (default) = The default job queue for most submitted jobs, such as reports and batch updates and processing. Processes one job at a time (single-threaded queue). • QSYSNOMAX = The default job queue for Generating Membership Orders (EGMO) and jobs submitted through Working with Integration Layer Processes (IJCT). Can process multiple jobs at the same time (multi-threaded queue). • <i>oms.job.queue.interactive</i> = The job queue where interactive user sessions run. This job queue processes multiple jobs at the same time. • ASYNC = The job queue where background processes, submitted through Using the ASYNC Jobs (MBJC), run. Can process multiple jobs at the same time. • ECOMMERCE = The job queue where the ECOMM_CANC job and the ORDER_EDIT job (generated through the ORDER_IN job in Working with Integration Layer Processes (IJCT)) run automatically. Can process multiple jobs at the same time. • PICKGEN = The default job queue for Streamlined Pick Slip Generation (WSPS), Reprocess Authorizations Screen (RPAA), and Processing Auto Deposits (SDEP). Processes one job at a time. • AUTODEP = The default job queue for deposit processing. Processes one job at a time.
<- Route Job	Use this button to route a job to the queue selected in the Queue field, described above: • Select one or more jobs from the Job listings area, below. • Select a queue from the Output Queue field. • Click this button to move the job to the selected queue. You can select a different route only if the job has not yet started to run (RDY status).

Field	Description
Job Listings	Default settings for jobs available for review: When you first advance to this screen, up to 200 jobs submitted by your user ID are currently available for review by scrolling up or down with the right-hand scroll bar. The jobs are listed in reverse chronological order (newest to oldest). A message displays if more than 200 jobs are available for review: The maximum number of records was exceeded. Please refine search criteria. Showing records 1-200. Available jobs updated when you filter: When you enter or select any search criteria and then click Filter, the screen displays up to 200 jobs that match these criteria. Example: The screen currently includes 200 jobs available for review in reverse chronological order (newest to oldest): 180 of these jobs run in QBATCH, and 20 run in ASYNC. When you select QBATCH from the Queue field and click OK, the screen displays up to 200 jobs that run in QBATCH. Available jobs restricted: If your user control record does not have All job authority selected, you cannot review jobs submitted by other users. Example: If you do not have All job authority, when you filter on a Job name of PICK_GEN, pick slip generation jobs submitted by other users are not displayed.
Action	An arrow in this field indicates an action can be performed against the job. Valid actions are: • Hold = Available if the job's status is Ready. • Release = Available if the job's status is Hold. • End = Available if the job's status is Message. • Delete = Available if the job's status is Ready, Hold, Finished, Error, or End. If you attempt to delete a job that is actually running, the screen displays an error message. See the Job Management Screen Options.

Field	Description
User name	The user name of the person who submitted the job, or who is using an interactive session. Defaults to your user ID. Submitted through web service request? When you use the CWProcessIn message or the ProcessIn message to start a periodic process, if the message did not indicate to wait for completion, the job is listed under the default user set up during installation; otherwise, if the message indicated to wait for completion, the job is not listed on this screen. Contact your cloud administrator or system administrator to confirm the user ID of the default user, and see Using the CWProcessIn Message to Start a Periodic Process or Using the ProcessIn REST Message to Start a Periodic Process for background. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Filter options: The following options are available only for users whose All Job Authority setting is selected: - to display jobs submitted by another user: enter a complete, valid user ID and click OK. - to display jobs regardless of the user who submitted them: clear the current entry in this field and click OK. See the Administration guide for more information on setting up users.
Job name	A code identifying the job. The job name for an interactive session has a name starting with QPADEV (for example, QPADEV0B9A). Defaults to blank. Note: The reports icon () indicates that the job has generated one or more reports. Once the job status is Finished, select the icon to advance to the Document Management (My Docs) screen, where you can review the reports generated by that job. Filter options: - to display jobs based on job name: enter a full or partial job name and click OK. - to display jobs regardless of name: if you have previously entered a job name, clear the entry and click OK. No report? If there was no information matching the selection criteria for the report, the system may not generate a blank report; instead, you see the reports icon () indicating that a report is available, but when you advance to the Document Management (My Docs) screen, there is no report available to review.
Job	A system-assigned identification number to track the job. Defaults to blank.

Field	Description
Status	The current status of the job. Defaults to all jobs regardless of status. Possible statuses are: • blank (default) = Select this option to display all jobs regardless of status. • Ready = The job is currently waiting in the indicated job queue for processing because another job is currently active in that job queue, and the queue is single-threaded (processes only one job at a time). Optionally, you can expedite processing by routing the job to a different job queue that does not currently have a job running, or that is multi-threaded: Select the job, select the Output Queue at the top of the screen, and click <- Route Job. • Held = The job is held. Optionally, you can release the job by selecting the Action checkbox to the left of the job and selecting Release. • Run = The job is currently running normally. It is not possible to hold the job or change its job queue. • Finished = The job has finished running normally. If there is a reports icon () next to the job, you can click the icon to advance to the Document Management Screen and review or print the generated reports. Note: Generated forms (such as pick slips, purchase orders, or checks) are available at the Forms Management (My Forms) screen, not the Document Management (My Docs) screen. • Message = Possible explanations: • Order Administration has written a message to a log file, and the job cannot continue processing. • Someone restarted Order Administration while the job was active. In this situation, you should end the job at the Job Management screen and then start it again the usual way. • Occasionally, the async jobs go into Message status even though they are continuing to process records. See Troubleshooting the Async Jobs for more information. • End = Someone has manually ended a job whose status was Run, but was not running normally (perhaps because the server rebooted while the job was running). In this case, use the JOBCLN periodic function. See Using the JOBCLN Function to Resolve Job Status Across Servers for more information. • Error = Someone has manually ended a job that was not running normally. Integration layer jobs Jobs you start through the Working with Integration Layer Processes (IJCT) option might not display the current, correct status if they receive inbound messages and have not yet received any messages to process.

Field	Description
	Async jobs When the async jobs in the Background Job Control (MBJC) menu option are active, the system periodically checks the status of each async job, and changes the status to Run, if necessary. For example, if the ORDR_ASYNC job is active and you end it at this screen, the system automatically changes the status of the job back to Run. To start or stop the async jobs, use the Background Job Control (MBJC) menu option. See Working with the CNTL_ASYNC Job. Filter options: - to display jobs by status: select a status from the drop-down list and click OK. - to display jobs regardless of status: if you have previously selected a status, clear the entry and click OK.
Started	The date and time when the job started. Defaults to blank. NONE indicates the job has not yet finished (the status is Ready, Hold, or Run). Filter options: - to display jobs started on or after a specific date: click the calendar icon () , select a date, and then click OK. - to display jobs started on the current date: click the calendar icon, select Today from the bottom of the calendar, and click OK. - to display jobs regardless of start date: if you have previously selected a date, clear the date and click OK.
Ended	The date and time when the job finished. Defaults to blank. NONE indicates the job has not yet finished (the status is Ready, Hold, or Run). Filter options: - to display jobs ended on or before a specific date: click the calendar icon () , select a date, and then click OK. - to display jobs ended on the current date: click the calendar icon, select Today from the bottom of the calendar, and click OK. - to display jobs regardless of end date: if you have previously selected a date, clear the date and click OK.
Runtime	The amount of time, in seconds, that the job took to run. Set to 0 if the job has not yet completed. Display-only.
Output Queue	The job queue where the job will run, is running, or ran. Defaults to blank. See the Output Queue field above for a listing of system-delivered queues. Filter options: - to display jobs by queue: select a queue from the drop-down list and click OK. - to display jobs regardless of queue: if you have previously selected a queue, clear the queue and click OK.
Log	A link to a brief log file for the job; available if the job has finished running and your user ID is assigned to Rank 1. This log provides just a list of the programs called in order to complete the job. See Logs for additional logs you can use for troubleshooting.

Job Management Screen Options

Option	Procedure
Restrict or expand the list of displayed jobs based on one of the available column headings	See the Job Listings for information on how to filter the jobs displayed based on various criteria.
Refresh data listed on the screen	Click Refresh. Newly submitted jobs are added to the screen in RDY status as they are submitted, and the status of existing jobs is updated.
Sort by column	Click the column heading name. When you first click, the sort is in ascending alphanumeric (A-Z) or numeric (lowest to highest) order. Click again to change the sort to descending (Z-A) or numeric (highest to lowest) order.
Change a job's status or queue	
Hold a job	If the job has not yet processed (its status is Ready), you can hold it by selecting Hold in the Action field for the job.
Release a job	If the job is currently held (its status is Hold), you can release it by selecting Release in the Action field for the job.
End a job that is currently running	If the job's status is Message, you can end the job by selecting End in the Action field for the job. A window opens if you have selected to end an active job: Warning! You have chosen to end one or more active jobs. PRESS OK TO END JOB, or PRESS CANCEL TO LEAVE JOB RUNNING. At this window, select OK to end the job and update its status to End. If a job is currently running but you suspect that the job is not running normally, use the JOBCLN periodic function. See Using the JOBCLN Function to Resolve Job Status Across Servers for more information. Note: Sometimes when you select to end a job, the job does not end and remains running. In this case, you can use the JOBCLN periodic function.
Delete an individual job	If the job's status is Ready, Hold, Finished, Error, or End, and is not actually running, you can delete the job by selecting Delete in the Action field for the job. Note: Deleting a job also automatically deletes all generated reports for that job that would also be available under the Document Management (My Docs) screen; however, it does not delete forms that are available at the Forms Management (My Forms) screen.

Option	Procedure
Delete selected jobs	Select the check box to the left of each job you wish to delete and select Delete at the top of the screen. Note: - You can delete a job only if its status is Ready, Hold, Finished, Error, or End and it is not actually running. - Do not select delete for a job that is currently running. If you attempt to delete any jobs that are currently running, the screen displays an error message. - Deleting a job also automatically deletes all generated reports for that job that would also be available under the Document Management (My Docs) screen; however, it does not delete forms that are available at the Forms Management (My Forms) screen.
Route one or more jobs to a different queue	If the job is currently ready for processing (its status is Ready) or is hold (its status is Hold) you can route it to a different queue by: - Selecting the checkbox to the left of the job. - Selecting a different queue from the Output Queue drop-down list at the top of the screen. - Selecting <- Route Job at the top of the screen. Why route? You might want to route a job to a different queue to expedite processing (for example, if another job is currently running in the job's default queue, and the queue is single-threaded, meaning that only one job at a time can run in that queue at a time).
Display additional information about a job or advance to a different screen	Note: If you advance to a different screen and then return, your filter entries are not retained. For example, if you are currently filtering on a specific queue, and you advance to the Document Management (My Docs) screen and return, the Queue column no longer filters on that queue.
Review the log for a job	Click Log file for a job to display its log. Note: A User Rank of 1 is required in order for the user to display the contents in log contents, including the logs written for the user's own submitted jobs. Otherwise, the window displays a message: Not Available.
Display the server where a user is logged in, or display the command used to execute a job	Move your cursor over the Action icon to the left of the job entry. The Command field displays: - User interactive sessions: the name and IP address of the server where the user is logged in. For example, a Command of OMS-srv/123.456.789.123 indicates that the user is logged into Order Administration on the OMS-srv server, which has an IP address of 123.456.789.123. - Batch or submitted jobs: the command executed for the job, such as CALL PGM(flr2012) PARM(' x'003F' x'00055F' 'N').

Option	Procedure
Review, and optionally print, reports generated by a job	Click the reports icon () next to a job to advance to the Document Management Screen , where the reports generated by the selected job are listed. From this screen, you can print the report using the printers currently available to your local PC. Note: Forms, such as pick slips, purchase orders, or checks, are available from the Forms Management Screen rather than the Document Management Screen .
Display information about Order Administration	Select About.
Advance to the Forms Management Screen	Select My Forms.
Advance to the Document Management Screen	Select My Docs.
Advance to the Advanced Commands screen.	Select Advanced commands. This option is available only for users that have authority to the Advanced Commands option.
Return to the previous Order Administration screen	Select Exit.

Jobs Troubleshooting

Question	Possible Answer(s)
Why are the background async jobs not starting correctly?	See Troubleshooting the Async Jobs .
Why can't I change the status of an async job?	When the async jobs in the Background Job Control (MBJC) menu option are active, the system periodically checks the status of each async job, and changes the status to RUN, if necessary. For example, if the ORDR_ASYNC job is active and you end it at this screen, the system automatically changes the status of the job back to RUN. To start or stop the async jobs, use the Background Job Control (MBJC) menu option. See Working with the CNTL_ASYNC Job . Also, to correct jobs whose statuses are incorrect, use the JOBCLN periodic function. See Using the JOBCLN Function to Resolve Job Status Across Servers for more information.
Why do I receive the error Function key not allowed when I press F5 to refresh the Job Management screen?	To refresh the Job Management screen, click Refresh.

Question	Possible Answer(s)
Why does a submitted job go into Message status?	Typically, this occurs because someone has stopped and restarted Order Administration. In this case, use the JOBCLN periodic function to resolve. If this is not the reason, check the following logs to determine other possible reasons, looking for messages that were written to the log at the time when the job went into Message status. For example, an error such as <code>out of memory</code>, <code>program not found</code>, or <code>null pointer</code> might help you determine the cause of the problem. The jobs and the activities they track are: • CWDirect Log: General application processing. • MQ Log: XML and transactional message processing and message contents. • Application Log: Order Administration application processing. • Response Log: Jobs that require user intervention in order to proceed, such as authorizations and deposits, and stored value card activations, balance inquiries and authorization reversals. • Trace Log: Internal activity related to Order Administration application processing. • Manifest Log: Manifest processing. To Reset the Job Status Use the Display Active Batch Jobs Screen to determine if the job is actively running. To fix: If the job status is inconsistent, run the JOBCLN periodic function. See Using the JOBCLN Function to Resolve Job Status Across Servers for more information.
Are job entries automatically deleted?	Jobs older than the <code>oms.job.purge.retain.days</code> property in Working with Admin Properties (CPRP) are deleted when you restart Order Administration.
How can I delete a job if it's not actually running, regardless of the displayed status?	If the screen displays an error message when you attempt to delete a job, but the job is not actually running, use the JOBCLN function, as described above.
After I deleted all of the documents for a submitted job, why does the job remain on the My Jobs screen?	Deleting all of the output for a submitted job does not delete the submitted job. You need to use the Remove option to remove the job. Note: You should remove a submitted job if it is in finished (FIN) status. Evaluate the status of a job that is in an error (ERR) or message (MSG) status before removing it.
Does deleting a job entry delete its associated documents?	Deleting a job entry automatically deletes all generated reports for that job that would also be available under the Document Management (My Docs) screen; however, it does not delete forms that are available at the Forms Management (My Forms) screen.

Question	Possible Answer(s)
How can I review all of the jobs for a particular job queue?	On the Job Management screen, clear the User Name field, select the job queue from the Queue drop down box and click Filter. Note: This option is available only if you have the required authority based on your user control record. Contact your Order Administration representative if you need information on configuring user control records.
Why can't I see jobs submitted by all users?	If your user control record does not have All job authority selected, you cannot review jobs submitted by other users. Contact your Order Administration representative if you need information on configuring user control records.
Can I choose the job queue the system uses to process a job?	When a job is first submitted to the job queue, the system automatically chooses which job queue to use to process the job, based on the type of job submitted. However, if the job has not yet processed (its status is Ready), you can route it to a different job queue by: • Selecting the checkbox to the left of the job. • Selecting the job queue from the drop-down box next to the <- Route Job button. • Selecting Route Job. This option is useful if, for example, a large job is currently active in QBATCH, and you would like to run a report job in a separate job queue so it will process quickly.

Question	Possible Answer(s)
How can I review and query batch jobs that have run?	Reviewing Job History The Display Job History (DJHY) screen displays the Job History table. You can review the data and search by server, date range, job queue, and/or job name. The Job History table in the Order Administration database lists batch jobs that have run, including batch jobs that have been removed from the Job Management Screen. These records remain in this table up to the specified purge days. The fields in this table are: • Job #: The system-assigned identification number to track the job. • Job Name: The name of the job, such as PICK_OUT or BILL_ASYNC. • Start Date: The date the job was started. • Start Time: The time the job was started. • End Date: The date the job finished. Set to 0 if the job did not end. • End Time: The time the job finished. Set to 0 if the job did not end. • Submitted By: The user ID of the person who submitted the job. • Job Queue: The job queue where the job ran, such as QSYSNOMAX or ASYNC. • Server: The name and IP address of the Order Administration application server where the job ran. Purging Records in the Job History Table The <i>oms.job.history.purge.retain.days</i> property setting in Working with Admin Properties (CPRP) defines how long to retain a batch job in the Job History table before the system purges it automatically based on the job's End date. The default setting is 30 days. The PURGEJH periodic function purges all records in the JOB_RUN_HISTORY table including related record in JENASYSJOB where the End Date is empty AND the job is NOT running. If the job is done and the last record didn't get any End Date populated, purge that record and any previous related records to that job. If a record is found without an End Date is not running, use the Start Date and only if that is greater than the number of days configured in <i>oms.job.history.purge.retain.days</i> property to determine if it will be purged.
Why can't I see the contents of the log for a job I submitted?	A User Rank of 1 is required in order to display the contents in the Log column, including the logs written for your own submitted jobs. Otherwise, the window displays a message: Not Available.

5

Accounting Setup

Setting Up the Accounting Tables

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

- [Working with Entities \(WENT\)](#) describes creating, changing, deleting, and displaying entity codes.
- [Working with Divisions \(WDIV\)](#) describes you how to create, change, delete, and display divisions, how to assign a division to an entity, and how to display divisional history (summary statistics of a division's sales performance).
- [Payment Configurations](#) describes how to create, change, delete and display any Merchant Account Providers for Credit, Debit, or Wallet Payment Methods that process through EFTConnect. You would use [Work with Authorization Services \(WASV\)](#) and [Working with Pay Types \(WPAY\)](#) for other payments, such as for stored value cards (gift cards).
- [Work with Authorization Services \(WASV\)](#) describes how to create, change, delete and display Merchant Account Providers for External Payment Service Credit Card and Stored Value Cards, Customer Engagement Stored Value Cards and PayPal. You cannot create, change, or delete an authorization service that uses EFTConnect through this option, instead, use the Payment Configurations option in Modern View to create and manage any payment processing through EFTConnect. Once the merchant account is created, configure additional settings for the EFTConnect authorization service within Work with Authorization Services such as Response Code hold reasons or country and currency mappings.
- [Working with Pay Types \(WPAY\)](#) describes how to create, change, delete, and display payment methods for External Payment Service Credit Card and Stored Value Cards, Customer Engagement Stored Value Cards, PayPal, Cash/Check and Generic payments used for processes like retail pickup and delivery orders. You can only display pay types that use EFTConnect through this option. This topic also includes information about specifying the financial conditions under which an order will go on hold and describing the characteristics of the stored value cards you honor (for example, length of card number, leading digits, authorization and deposit services).
- [Working with Banks \(WBNK\)](#) describes how to create, change, delete, and display bank information including bank codes and their descriptions and the transit number associated with a bank.
- [Working with Accounting Periods \(WACP\)](#) describes how to create, change, delete, display and close accounting period information including specifying year, start date, and end date for the period.
- [Working with Currency \(WCUR\)](#) describes how to create, change, delete, and display currency information.
- [Working with Sales Representatives \(WSLS\)](#) describes how to create, change, delete, and display sales representative information. This topic includes information about your sales

representatives, the center to which they are assigned, and their commission and bonus structure.

- [Salesman Associate Upload](#) describes how to upload salesman information from an external system to create or update records the Salesman table.

6

Customer Service

- [*Establishing Customer Service Tables*](#)
- [*Setting Up Customer Support Tables*](#)
- [*Creating and Updating Customers*](#)
- [*Order Inquiry*](#)
- [*Performing Order Maintenance*](#)
- [*Order Status Reports and On-line Inquiries*](#)
- [*Managing Declined Authorizations*](#)
- [*Releasing Held Orders*](#)
- [*Managing Returns*](#)
- [*Issuing Refunds*](#)
- [*Working with Catalog Requests*](#)
- [*Managing Soldouts and Backorders*](#)
- [*Processing and Purging Subscriptions*](#)
- [*Memberships*](#)
- [*Email Repository*](#)
- [*Customer Service Appendices*](#)

Establishing Customer Service Tables

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

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

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

Setting Up Customer Support Tables

The following topics describe how to create and maintain tables that support Order Entry and Customer Service activities:

- [Setting Up the Country Table \(WCTY\)](#) describes the screens you use to create, change, delete, and display country codes.
- [Setting Up the Zip/City/State \(Postal Code\) Table \(WZIP\)](#) describes the screens you work with to create tables that support address and tax information associated with postal and zip codes.
- [Setting Up Customer Profiles \(WPFL\)](#) describes the screens you use to define demographics categories and their data options for profiling your customer base.
- [Setting Up the Customer Class Table \(WCCL\)](#) describes the Work with Customer Class screens you use to establish codes to group customers for reporting and other purposes.
- [Setting Up Match Codes \(MMCH\)](#) describes how to view or change the match code structure.
- [Setting Up User-Defined Fields \(WUDF\)](#) describes how you can “design” a screen with user-defined numeric, text or date fields, which you can link to another table (such as the Customer table).
- [Working with Postal Code Formats \(WPCF\)](#) describes how to define the formats of zip and postal codes, so that they will print correctly on pick slips and gift acknowledgments.
- [Working with Mail/Call Codes \(WMCC\)](#) describes how to create codes that define when and under what circumstances you call or send mail to your customers.
- [Working with Customer Action Reason Codes \(WCAR\)](#) describes how to create codes that allow you to define and track the types of issues your customers raise.
- [Working with Customer Note Types \(WNTY\)](#) describes how to create codes that allow you to flag certain types of customer notes to appear automatically in order entry, or define text to default into the note field.
- [Working with Language Codes \(WLAN\)](#) describes the screens you use to create, change and delete language codes.

Creating and Updating Customers

Topics in this part: The following topics describe how to create and maintain customer information on the system through the Customer Maintenance module:

- [Understanding Customer Types](#) describes the three types of customers you work with throughout the Customer Maintenance module.
 - [Selecting Customers](#) explains how to use the Customer Maintenance Selection Screen to search for existing customer records.
 - [Creating and Updating Sold-to Customers \(WCST\)](#) describes the Work with Customers screens you use when creating and updating sold-to customers.
 - [Creating and Updating Ship-to Customers \(WCST\)](#) describes the screens you use when creating and updating ship-to customers.
 - [Creating and Updating Bill-to Customers \(WCBT\)](#) describes the screens you work with when creating and updating bill-to customers.
 - [Work with Contract Price Screen](#) describes how to establish special contract pricing opportunities for a customer.
 - [Working with Customer Tax Status](#) describes the tax status that you can apply to customers, including standard taxes and exemptions.
 - [Working with Pay Type Exclusions](#) describes how to apply payment method exclusion codes to a customer.
 - [Reviewing Customer History](#) describes how to view a customer's mail history, item history, and order summary and detail history.
 - [Work with User Fields Screen](#) describes how to change, delete, or display information for user-defined fields.
 - [Reviewing Customer Address Changes](#) describes how to display address changes that you enter for your customers.
 - [Printing the Customer Exposure Report \(PCER\)](#) describes how to print a report listing customer action notes entered and customer action reason codes used on each.
 - [Printing the Customer Detail Exposure Report \(PCAR\)](#) describes how to print a report listing customer action notes, including details on the customer.
 - [Working with Customer Warranty Information \(WCST\)](#) describes the screens you use to review and work with items you shipped to customers at no charge, in fulfillment of a warranty.
 - [Working with Customer Email Addresses](#) describes how the system stores and validates email addresses for sold-to customers, and presents the screens you use to work with email addresses.
 - [Working with Customer Ownership](#) describes how to create and update information about the products a customer owns.
 - [Working with Alternate Customer Number Cross-References](#) describes the screens you use to work with additional alternate customer numbers assigned to a customer.
 - [Generic Customer API](#) describes how to create or update customers through a generic XML message.
- For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

- [Customer Engagement Customer Integration](#) describes how to keep customer information in sync with Oracle Retail Customer Engagement when Oracle Retail Customer Engagement is the system of record for customer data.

Understanding Customer Types

Purpose: Use the Customer Maintenance programs to maintain existing customer information and create new customer records without creating orders. You use the Customer Maintenance programs when you need to:

- Enter customer address changes
- Construct a demographics profile
- Create a contract price for a short-term sale
- Change a customer's tax status, payment type, etc.
- Add a customer service action note
- Review a customer's ordering history

In this topic:

- [Defining Customer Types](#)
- [Customer Type Relationships](#)

Defining Customer Types

Purpose: There are four customer types:

- Sold-to
- Ship-to
- Bill-to

You need to understand the customer types in order to work with Customer table maintenance.

Sold-to customers: A sold-to customer is a person who places an order. Name, address, and mailing information for sold-to customers is in the Customer Sold-to table only.



Note:

The [Customer Engagement Customer Integration](#) includes only sold-to customers.

Ship-to customers: A ship-to customer is a person who receives an order. The system generates a temporary ship-to record for every sold-to customer when you enter an order. You can create permanent ship-to customers through Customer Ship-to when you enter an order.

- *Permanent ship-to customers* are customers who request a ship-to address different from their sold-to address. The Customer Ship-to table stores permanent ship-to customer information.
- *Temporary ship-to customers* are customers who receive the shipped order but do not place the order or pay for the order (for example, gift recipients). The Order Ship-to Address table stores temporary ship-to customer information.

Bill-to customers: A bill-to customer is a person who pays for an order. A bill-to customer record is required when the person who pays for the order is different than the sold-to customer.

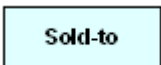
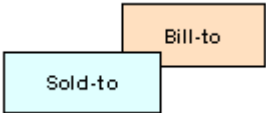
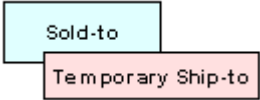
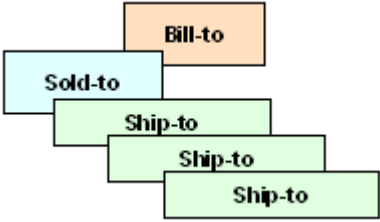
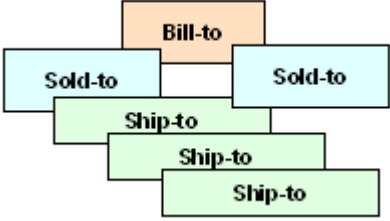
You can assign bill-to customer addresses through Order Entry if the system control values [Create/Assign Bill To Customers in Order Entry \(A76\)](#) is *selected*.

The system generates bill-to records for business-to-business customers. Business-to-business customers are customers who ship to a consistent address, have a permanent account, and are commercial in nature.

You can define a business-to-business customer by *selecting* the Commercial flag for a customer. Once you have established a bill-to customer account, the account remains permanently in the Bill-to customer table.

Customer Type Relationships

The figure below illustrates the relationships between the customer types.

Illustration	Customer Type and Payment Methods
	(Sold-to) customer places, receives, and pays for order. Payment methods: Cash, Check, Credit Card
	(Sold-to) customer places and receives order, but someone else receives the bill. Payment methods: Credit Card
	(Sold-to) customer places and pays for order, but directs shipment to another (Temporary Ship-to) person. Payment methods: Cash, Check, Credit Card
	(Sold-to) customer orders for one or more (Permanent Ship-to) locations, and directs bill to a separate (Bill-to) accounting function. Payment methods: Credit Card
	One or more (Sold-to) customer orders for one or more (Permanent Ship-to) receiving locations, but each Sold-to directs their bills to a single (Bill-to) accounting function. Payment methods: Credit Card

Rules to remember: The following is a list of guidelines to keep in mind when working with the different customer types.

- Every order has at least a sold-to customer
- The system creates a bill-to record if the person paying for the order is different from the person placing the order
- More than one permanent ship-to record can exist under a single sold-to, if the sold-to regularly places orders to be shipped to different locations

For more information: See [Creating and Updating Customers](#) for options related to creating and working with each customer type.

Selecting Customers

Introduction: You can select existing sold-to customers by entering information in any of the fields on the Customer Maintenance Scan screen. You can use this function to locate and view a particular customer record or to display a list of customer records that match the information you enter.

Purpose of this topic: This topic shows you how to use the system's scanning functions to search for and locate customer records.

In this topic:

- [Scanning for Customers](#)
- [Select Customer Sold To Screen](#)
- [Work with Customers Screens \(Selecting a Customer\)](#)

Scanning for Customers

How scanning works: When scanning, the system searches the Sold To Customer table for customers with information that closely matches the information you enter, then lists these customers on a scan screen. You select the customer record you want to work with from the scan screen.

There are some general principles to keep in mind as you scan for a customer:

1. If you enter information in any numeric field (other than the Customer field), the system displays a list of possible matches in ascending numerical order (1, 2, 3..., etc.), beginning with the number you typed and continuing to the end of the table
2. If you enter information in any alphanumeric field, the system displays a list of customers in ascending alphabetical order (a, b, c..., etc.), then in ascending numerical order (1,2,3..., etc.), beginning with the text you typed and continuing to the end of the table.
3. When you position the cursor on any scannable field on a scan screen, and select *Scan* without typing anything in the field, the system displays a list of all records from the table in ascending order for the field you selected.
4. If no customers match the criteria you enter, the system displays a list of all possible matches in ascending order beginning with the text you entered and continuing to the end of the table. For example, if you type *Smith* in the Last name field, but this name is not found in the customer database, your screen displays customer records starting with the first name closest alphabetically to "Smith" through the end of the alphabet.

Oracle Retail Customer Engagement Customer Integration: If the [ORCE Customer Integration \(L37\)](#) system control value is set to *INTERACT*, you use the [Customer Scan Screen](#) instead of the [Select Customer Sold To Screen](#) to search for customers, and the system searches for customers in Oracle Retail Customer Engagement rather than in Order Administration. See the [Customer Scan Screen](#) for more information.

Select Customer Sold To Screen

Purpose: Use this screen to search for customers in the Customer Maintenance table; see [Selecting Customers](#).

How to display this screen: If the [ORCE Customer Integration \(L37\)](#) system control value is set to blank, enter *WCST* in the Fast path field at the top of any menu or select *Work with Customers* from a menu; otherwise, if the system control value is set to *INTERACT*, you advance to the [Customer Scan Screen](#).

You can navigate directly to the [Customer](#) page in Modern View from Classic View if the order inquiry link is for a customer and not a specific order. Once in Modern View, if you originally came from one of the links in Classic View, you can navigate back to the original screen and company in Classic View where you will need to exit the screen manually.

1. Select More/Subscriptions.
2. Select More/Order Inquiry.

Select Switch to Classic View to return to Classic View.

Field	Description
Customer	A unique number to identify a customer. The system assigns a customer number automatically whenever you add a new customer (either when you enter an order for a new customer or when you Select <i>Create</i> to add the customer record manually through the Sold To Customer table). You can scan on just the customer number, or on a combination of the customer number and ship-to number. When you enter an invalid customer number, you advance to the Work with Customers by Number screen. This screen lists customer records in ascending numerical sequence, beginning with the number you typed and continuing to the end of the table. You also advance to this screen if you enter an unassigned customer number. When you enter a valid customer number, you advance to the Change Customer screen. See Creating and Updating Sold-to Customers (WCST). Numeric, 9 positions; optional.
Ship-to number (Unlabeled field to the right of the Customer field)	Identifies the number of shipping addresses on the order. You can scan on the ship-to number alone, or the complete customer ship-to number (which is the customer number and the ship-to number). If you enter a customer ship-to number that identifies a permanent ship-to record, you advance to the Change Ship To screen for the ship-to record you selected. If you enter only a ship-to number, you advance to the Work with Customers by Number screen, which list customers in ascending numerical sequence, beginning with the number you typed and continuing to the end of the table. Numeric, 3 positions; optional.
Match code	A unique customer code the system assigns to each customer to identify duplicate customer records. Match codes is a user-defined algorithm, which consists of portions of the customer's name, address, and postal code. When you enter a full or partial match code, you advance to the Work with Customers by Match Code screen, which lists customers in ascending match code sequence, beginning with the code you typed and continuing to the end of the table. Alphanumeric, 15 positions; optional.

Field	Description
Postal code	The postal or zip code for this customer. Enter a full or partial code to advance to the Customers by Postal Code/Company screen. This screen lists all customers by postal code in ascending (lowest to highest) numeric sequence, beginning with the code you entered. <i>Scan length:</i> The Postal Code Scan Length (F61) system control value controls how many characters of the postal code to use when searching for a customer. See that system control value for a discussion. If you enter a postal code and last name, you advance to the Customers by Postal Code/Last Name screen, which lists all customers alphabetically beginning with the postal code you entered. Alphanumeric, 10 positions; optional.
Last name	The sold-to customer's last name. When you enter all or part of a customer's last name, you advance to the Work with Customers by Last Name screen, which lists customers by last name, beginning with the letters you entered and continuing to the end of the table. The Last name field is indented beneath the Postal code field. You can enter information in both fields to scan for a particular customer. Alphanumeric, 25 positions; optional.
Company	The company name associated with the customer. When you enter a full or partial company name, you advance to the Work with Customers by Company Name screen, which lists customers by company name, beginning with the letters you entered and continuing forward to the end of the table. Notice that the Company field is indented beneath the Postal code field. You can enter information in both of these fields for scanning purposes. Alphanumeric, 30 positions; optional.
Telephone#	The customer's telephone number. When you enter a full or partial telephone number, you advance to the Work with Customers by Phone Number screen, which lists customers by telephone number. You can define a telephone number format for each country to map to the phone numbers operators enter into the system. See Setting Up the Country Table (WCTY), for more information. Note: Your entry should include any formatting specified by the telephone number format for the country; for example, if the telephone number format for the United States is (111) 111-111, your entry should include the parentheses and hyphen. Alphanumeric, 14 positions; optional.

Field	Description
Alternate customer number	An additional number to identify the customer on the system. This might be a customer number carried over from a system conversion. Enter an alternate customer number to advance to a subsequent scan screen that lists customers by alternate customer number. See Display Alternate Customer Cross Reference Window (I84) for more information. Alternate Customer Number Label Description The field label on this screen is based on the name you enter in the Alternate Customer Number Label Description (H95) system control value; if you do not enter a name in this system control value, the field label is Alt cust. <i>Example:</i> If you enter the field label name <i>MEMBER#</i> in the system control value, the field label on this screen is <i>MEMBER#</i>. Alphanumeric, 15 positions; optional.
E-mail Address	An e-mail address for the customer. When you enter a full or partial email address, you advance to the Scan Customer by E-mail Address screen, where you can scan by any email address on file for a customer. This field is not case-sensitive; an email address of <i>abc@example.com</i> matches an entry of <i>ABC@example.COM</i>, and vice versa. Alphanumeric, 50 positions; optional.

Screen Option	Procedure
Create a new customer	Select <i>Create</i> . See Creating and Updating Sold-to Customers (WCST) .

Work with Customers Screens (Selecting a Customer)

Purpose: Whenever you enter information in a field at the Select Customer Sold To Scan screen, you advance to a screen that lists customers in ascending numerical or alphabetical order, beginning with the first customer that matches the information you entered.

The customer number is an exception to this rule. When you enter a valid customer number, you advance directly to the Change Customer screen for the specified customer.

You can use the Work with Customer screen to narrow down your search, or to select and work with a specific customer.

About this screen: Work with Customer screens display different information, depending on the information you entered on the initial selection screen.

The Work with Customer screen, for example, displays the company name and street address, and lists customers in ascending alphabetical order by company name.

Field	Description
Information on Line 1:	
Company name	The name of the company. Alphanumeric, 30 positions; optional.
Customer	A unique number to identify a customer. Numeric, 9 positions; display-only, assigned by the system.

Field	Description
Cls (Customer class)	A user-defined code that categorizes customers at a high level for reporting purposes. You can use customer class codes to: • mail offers to a limited group • restrict items from being sold • bypass normal item reservation Class codes are defined in and validated against the Customer Class table. See Setting Up the Customer Class Table (WCCL). Numeric, 2 positions; display-only.
Source (Source code)	A unique code assigned to a list of customer names to whom you target an offer (catalog, newspaper or television advertisement). See Working with Source Codes (WSRC). The customer's current source code displays. Alphanumeric, 7 positions; display-only.
Mail type	A code to classify the "type" of customer. Valid values are: • <i>B = Buyer</i>: A customer who places an order (also known as the "Sold To" customer). • <i>R = Recipient</i>: A customer who receives the order (also known as the "Ship To" customer). • <i>C = Catalog requester</i>: A person to whom you send a catalog (added automatically to the Sold To Customer table because they are a prospect for a future sale). • <i>L = List rental</i>: A customer whose name you purchased from a another company. • <i>S = Suspect/Prospect</i>: A customer whose name you have acquired by a telemarketing effort or a public or industry listing. Alphanumeric, 1 position; display-only.
Information on Line 2:	
Street	The customer's or company's street address. Alphanumeric, 32 positions; display-only.
City	The name of the customer's city. Alphanumeric, 25 positions; display-only.
State or Province	The code for the customer's state or province. Alphanumeric, 2 positions; display-only.
Postal code	The customer's postal (or ZIP) code. Alphanumeric, 10 positions; display-only.

Screen Option	Procedure
Create a new customer	Select <i>Create</i> . See the First Create Sold To Customer Screen .
Change information about the customer	Select <i>Change</i> for a customer. See Changing Sold To Customers .
Delete a customer	Select <i>Delete</i> for a customer. The system does not allow you to delete a customer record if you have taken orders for the customer. The screen displays a message such as: Orders exist for customer (xxxx) - cannot delete.

Screen Option	Procedure
Display information about the customer	Select <i>Display</i> for a customer. You advance to the first Display Customer screen. You cannot change any information on this screen. See the First Create Sold To Customer Screen for field descriptions.
Work with ship-to customers	Select <i>Ship To</i> for a customer to advance to the Work with Customer Ship Tos Screen .
Work with bill-to customers	Select <i>Bill To</i> for a customer. If the customer: 1. already has a bill-to customer and you: 2. have authority to the Work with Bill To menu option, you advance to the Work with Bill To Customers Screen. 3. do not have authority to the Work with Bill To menu option, you advance to the Display Customer Bill To screen. See the Create Bill-to Customer Screen for field descriptions. 4. does not already have a bill-to customer and you: 5. have authority to the Work with Bill To menu option, you advance to the Create Bill-to Customer Screen. 6. do not have authority to the Work with Bill To menu option, the screen displays an error message.
Work with subscriptions for a customer	Select <i>Subscriptions</i> for a customer to advance to the Work with Subscriptions Screen .
Work with contract pricing for a customer	Select <i>Contract Pricing</i> for a customer to advance to the Work with Contract Price Screen .
Work with state-specific tax exemptions for a customer	Select <i>Tax</i> for a customer to advance to the Work with Customer Tax Screen . See Working with Customer Tax Status for an overview.
Review mail history for a customer	Select <i>Mail History</i> for a customer to advance to the Display Customer Mail History Screen . See Reviewing Customer History for an overview of customer history.
Work with actions for a customer	Select <i>Actions</i> for a customer to advance to the Edit Customer Actions Window .
Work with the profile for a customer	Select <i>Profile</i> for a customer to advance to the Work with Customer Profile Screen .
Review item ordering history for a customer	Select <i>Item History</i> for a customer to advance to the Customer Sold To Item History Screen . See Reviewing Customer History for an overview of customer history.
Display customer order history	Select <i>Order History</i> for a customer to advance to the Display Customer Order History Screen . See Reviewing Customer History for an overview of customer history.
Exclude pay types for a customer	Select <i>Pay Type Exclusion</i> for a customer to advance to the Exclude Pay Types By Customer Screen .
Enter information in the user-defined fields for a customer	Select <i>User Fields</i> for a customer to advance to the Work with User Fields Screen .
Work with notes about a customer	Select <i>Notes</i> for a customer to advance to the Edit Customer Notes Screen .

Screen Option	Procedure
Review address changes for a customer	Select <i>Previous Address</i> for a customer to advance to the Display Address Changes Screen . See Reviewing Customer Address Changes for an overview.
Work with warranty information for a customer	Select <i>Warranty Info</i> for a customer to advance to the Work with Customer Warranty Information Screen .

Work with Contract Price Screen

Purpose: Use this screen to establish special pricing you are offering to a customer on selected items for a specific time period.

How to display this screen: Select *Contract pricing* for a customer at a Work with Customer scan screen (see [Selecting Customers](#)). You can also advance to this screen by selecting *Contract Pricing* from a create, change, or display sold-to customer screen (see [Creating and Updating Sold-to Customers \(WCST\)](#)).

Field	Description
Item #/SKU	Item Represents a unit of inventory. Alphanumeric, 12 positions, optional. SKU Represents an item's special characteristics, such as size, color, width, etc. Note: Scanning on this field is not currently implemented. Alphanumeric, three 4-position fields; optional.
Start date	The date when the contract price first becomes effective for this item. Numeric, 6 positions (in user date format); optional.
End date	The final date the contract price is effective for this item. Numeric, 6 positions (in user date format); optional.
Price	The price you are offering the customer for this item during the term of the contract. Numeric, 13 positions with a 2-place decimal; optional.
Tax incl (Tax-inclusive price)	The price you are offering the customer for this item during the term of the contract on orders subject to VAT. This field displays only if the Tax Included in Price (E70) system control value is <i>selected</i> . Numeric, 13 positions with a 2-place decimal; display-only.

Screen Option	Procedure
Create a contract price	Select <i>Create</i> to advance to the Create Contract Price Screen .
Change a contract price	Select <i>Change</i> for an item to advance to the Change Contract Price screen. At this screen, you can change the ending date or the contract price. See Create Contract Price Screen for field descriptions.
Delete a contract price	Select <i>Delete</i> for an item to delete it.

Screen Option	Procedure
Display a contract price	Select <i>Display</i> for an item to advance to the Display Contract Price screen. You cannot change any information on this screen. See Create Contract Price Screen for field descriptions.

Create Contract Price Screen

Create a contract price: Select *Create* at the [Work with Contract Price Screen](#) to create a contract price for an item you specify for the customer with whom you are working.

Field	Description
Customer	The customer's number, followed by the customer's name and company, if any. Numeric, 9 positions; display-only.
Item #/SKU	Item Represents a unit of inventory. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions. Create screen: required. Change screen: display-only. SKU Represents an item's special characteristics, such as size, color, width, etc. Alphanumeric, three 4-position fields. Create screen: required if the item has SKUs. Change screen: display-only.
Start date	The date when the contract price first becomes effective for this item. Numeric, 6 positions (in user date format). Create screen: required. Change screen: display-only.
Ending date	The date the contract price for the item expires. Numeric, 6 positions (in user date format); required.
Contract price	The price you are offering the customer for this item during the term of the contract. Numeric, 13 positions with a 2-place decimal; required.
Tax inclusive price	The price you are offering the customer for this item during the term of the contract if the order is subject to VAT. This field displays only if the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i> . Numeric, 13 positions with a 2-place decimal; optional.

Working with Customer Tax Status

Purpose: The tax exemptions you can assign to a customer include tax identification numbers, exemptions for nonprofit organizations, and exemption from VAT.

Exemption information set up in customer maintenance defaults in order entry and to orders you create through the order API, although you can override the information in order entry.

Web orders: Regardless of the tax status of the sold to customer, you can pass exemption/resale information on an order received through the *Generic Order Interface (Order API)* by entering *E* (Exempt) or *R* (Resale) in the *tax_exempt* attribute and defining a tax identification number in the *resale_exempt_id* attribute. In this situation, the exemption/resale information applies to the order ship to only and does not update the exemption/resale information for the sold to customer on the order.

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

Exemption/reseller options: You can set up:

- a customer-level exemption if the customer always qualifies regardless of shipping address
- resale or exemption numbers in the Customer Tax table for individual states
- VAT exemption at the customer level, if the customer might be subject to VAT

Expiration date? Optionally, you can specify an expiration date for customer tax exemptions at either the customer level, or at the state or province level. If the expiration date at the customer level has passed, the customer is not eligible for a tax exemption set up at either the customer or state/province level.

GST or PST: For Canadian taxing, you can define exemptions from either Goods and Services taxes, Provincial Services taxes, or both.

If you use an external tax system: You can set up tax exemptions for specific customers if you use an external tax system. You can also use a customer class to flag customers who are exempt. See [Vertex Setup](#) or [Avalara AvaTax Setup](#) for more information.

In this topic:

- [Customer Tax Overview](#)
- [First Level: Customer Exemption](#)
- [Second Level: VAT](#)
- [Third Level: State Exemptions](#)
- [Work with Customer Tax Screen](#)
- [Create Customer Tax Screen](#)

Customer Tax Overview

You can set up three levels of tax exemption information to default for a customer in order entry:

- Use the [First Level: Customer Exemption](#) if the customer is always:
 - tax exempt
 - not subject to tax as a reseller
 - subject to GST or PST only
- Use the [Second Level: VAT](#) if the customer is always exempt from VAT on orders subject to VAT.
- Use the [Third Level: State Exemptions](#) if the customer does not have a customer-level tax exemption or reseller tax identification number, but is exempt or a reseller in specific states or provinces.

First Level: Customer Exemption

Tax code and tax identification number specified for the customer: If the customer is always tax exempt regardless of shipping address, set up the *Tax code* code and *Tax identification* field for the customer. Any reseller or exempt information in these fields defaults into the Tax code and Tax identification fields in order entry and, as long as the *Expiration date (Tax identification expiration date)* is blank or specifies a future date, the reseller or exempt information remains on the order header when you select OK and the customer-level tax information applies.

Exempt tax identification number but no Tax code specified for the customer: If the customer has an Tax identification number but no Tax code, the tax identification number defaults in order entry, but the operator will need to complete the Tax code field. Setting up a customer record this way might be useful if you want to prompt the operator to evaluate the customer's tax status on an order-by-order basis.

Canadian tax exemptions for customers: If there is a Tax code of *GST only* or *PST only* for a Canadian customer, this information defaults in order entry, regardless of the value in the Expiration date field. These customers do not need to specify an Tax identification number.

Overrides state-specific settings from the Customer Tax table: If you specify tax-related information at the customer level, this information overrides the information set up through the *Work with Customer Tax Screen* for specific states or provinces. For example, if the customer has an *Expiration date (Tax identification expiration date)* in the future, but the state-level *Expiration date* for the customer's address is in the past, the customer is still eligible for a tax exemption, provided there is a *Tax identification* set up for the customer or a *Tax identification* set up for the state.

If you would like the customer to qualify for tax exemptions in particular states only, the tax-related fields at the customer level (*Tax code* code, *Tax identification*, and *Expiration date (Tax identification expiration date)*) should be blank.

Second Level: VAT

Vat number for the customer: If an order is subject to VAT, the system checks the *VAT number* field for the customer. An entry indicates that the customer is exempt from VAT, a taxing method that applies in only certain states in certain countries. When an order is subject to VAT, the customer is charged a tax-inclusive price, and the tax amount is "hidden" on the order detail line for the item, not included in the Tax bucket for the order. If the order is exempt from VAT, then the regular (tax-exclusive) pricing applies, and there is no hidden tax.



Note:

A customer who has a regular or reseller tax exemption is also exempt from VAT: the customer pays the regular (tax-exclusive) price, and neither hidden tax nor regular tax is added to the order.

The system applies the VAT exemption only if:

1. the customer has a *VAT number* defined, and the order is subject to VAT because:
2. the *Tax Included in Price (E70)* system control value is *selected*, and
3. the sold-to customer is located in a country that is different from the country for your company, as defined through the Work with Companies menu option (fast path = *WCMP*).

If a VAT exemption applies to the order, the setting of the Tax code field changes to *Exempt*, and the words *VAT EXEMPT* default into the Tax identification field for the order. In this case, you cannot override the tax status of the order to make it taxable.

**Note:**

You cannot set up a VAT exemption at the state level. VAT exemption information is at the customer level only.

Third Level: State Exemptions

You use the Customer Tax table, available by selecting *Customer Tax* in customer maintenance, to set up exemption or reseller records at the state or province level. State-specific information you have set up through the [Work with Customer Tax Screen](#) defaults in order entry only if:

1. there is no applicable [Tax code](#) code and [Tax identification](#) set up at the customer level, or you have cleared the fields in order entry, and
2. [Expiration date \(Tax identification expiration date\)](#) is specified at the customer level, or the date specified is in the future, and
3. [Expiration date](#) date is specified for the state of the shipping address; or the date specified is in the future, and
4. a VAT exemption has not defaulted on the order, and
5. the state-level record includes exemption (E) or reseller (R) information. No other type of state-level tax information defaults in order entry.

If you have tax information set up in the Customer Tax table, you need to clear the tax fields in order entry whenever you make any changes to the order that might affect its taxability.

Example: A customer has a reseller exemption in Massachusetts but not in Rhode Island, and the sold-to address is in Massachusetts. When you first advance to the order header screen in order entry, the Massachusetts tax identification number defaults. To override the customer's default tax status, clear the Tax code and Tax identification fields, and then enter the Rhode Island shipping address. In the case of a one-time ship-to address, you need to enter the ship-to address and then clear the related fields. This step enables the system to default the tax information, if any, for the Rhode Island address, and prevents the Massachusetts information from applying incorrectly.

Work with Customer Tax Screen

Purpose: Use this screen to create, change, delete, or display tax exemption information for a customer that is specific to a state or province. See [Working with Customer Tax Status](#) for a discussion.

How to display this screen: From any Work with Customer screen, select *Customer Tax* for a customer (see [Selecting Customers](#)). You can also advance to this screen by selecting *Customer Tax* at a Create, Change, or Display Customer screen (see [Creating and Updating Sold-to Customers \(WCST\)](#)).

Field	Description
Customer	A unique number assigned to each customer who places an order, and the customer's name or company name. Customer number: numeric, 9 positions; display-only, assigned by the system. Customer last name: alphanumeric, 25 positions; display-only. Customer first name: alphanumeric, 15 positions; display-only. Customer middle initial: alphanumeric, 1 position; display-only. Customer company name: alphanumeric, 30 positions; display-only.
Cty (Country)	The country where the customer has a reseller or other tax exemption. Country codes are defined in and validated against the Country table; see Setting Up the Country Table (WCTY). Alphanumeric, 3 positions; optional.
State	The state or province where the customer has a reseller or other tax exemption. State codes are defined in and validated against the State table, which is accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Alphanumeric, 2 positions; optional.
Tax (Tax code)	The tax status of the customer in the state shown. Enter a valid tax code to display tax records that match your entry. Valid values are: • <i>Exempt</i> = The customer is exempt from paying any taxes, including VAT, in this state or province. • <i>GST Only</i> = Not currently implemented at the state or province level. To flag a customer as eligible for Goods and Services tax only, use the Tax code setting at the customer level. • <i>Non-Tax</i> = Not currently implemented. • <i>PST Only</i> = Not currently implemented at the state or province level. To flag a customer as eligible for Provincial Sales Tax only, use the Tax code setting at the customer level. • <i>Resale</i> = The customer is a reseller and exempt from paying any taxes, including VAT, in this state or province. • <i>Standard</i> = The customer is subject to tax. Although you can create tax records using any of the codes above, retrieving tax status for any tax code but <i>Resale</i> or <i>Exempt</i> is not currently implemented. Optional.
Tax identification	The customer's tax identification number, typically the resale or exempt certificate number assigned to a customer who is identified as tax exempt (<i>E</i>) or as a reseller (<i>R</i>) otherwise, the tax identification number does not control taxability. Any combination of letters, numbers, or special characters is accepted. Alphanumeric, 30 positions; optional or required based on Tax code.
Expiration date	The date the customer's exempt or reseller tax identification number expires in this state. This expiration date applies only if there is not an Expiration date (Tax identification expiration date) specified at the customer level. Numeric, 6 positions (in user date format); optional.

Screen Option	Procedure
Create customer tax status	Select <i>Create</i> to advance to the Create Customer Tax Screen .
Change customer tax status	Select <i>Change</i> for a tax record to advance to the Change Customer Tax screen. At this screen, you can change the tax code or the resale/exempt number. See Create Customer Tax Screen for field descriptions.

Create Customer Tax Screen

To create: At the [Work with Customer Tax Screen](#), Select *Create* to create a tax record for a state or province.



Note:

You should set up Customer Tax records for exemptions or reseller tax identification numbers at the state level only if the customer does not have an exemption or reseller tax identification number at the customer level. See [Customer Tax Overview](#) for a discussion.

Field	Description
Customer	A unique number assigned to each customer who places an order, and the customer's name or company name. Customer number: numeric, 9 positions; display-only, assigned by the system. Customer last name: alphanumeric, 25 positions; display-only. Customer first name: alphanumeric, 15 positions; display-only. Customer middle initial: alphanumeric, 1 position; display-only. Customer company name: alphanumeric, 30 positions; display-only.
Country	The country where the customer has a special tax status. Country codes are defined in and validated against the Country table; see Setting Up the Country Table (WCTY). Alphanumeric, 3 positions, Create screen: required. Change screen: display-only.
State	The state or province where the customer has a special tax status. State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Alphanumeric, 2 positions. Create screen: required. Change screen: display-only.

Field	Description
Tax (Tax code)	The tax status of the customer in the state shown. The tax status of the customer in the state shown. Enter a valid tax code to display tax records that match your entry. Valid values are: • <i>Exempt</i> = The customer is exempt from paying any taxes, including VAT, in this state or province. • <i>GST Only</i> = Not currently implemented at the state or province level. To flag a customer as eligible for Goods and Services tax only, use the Tax code setting at the customer level. • <i>Non-Tax</i> = Not currently implemented. • <i>PST Only</i> = Not currently implemented at the state or province level. To flag a customer as eligible for Provincial Sales Tax only, use the Tax code setting at the customer level. • <i>Resale</i> = The customer is a reseller and exempt from paying any taxes, including VAT, in this state or province. • <i>Standard</i> = The customer is subject to tax. Although you can create tax records using any of the codes above, retrieving tax status for any tax code but <i>Resale</i> or <i>Exempt</i> is not currently implemented. If you enter a tax code of <i>Resale</i> or <i>Exempt</i>, a Resale/Exempt number is also required. Alphanumeric, 1 position; required.
Tax identification	The customer's tax identification number, typically the resale or exempt certificate number assigned to a customer who is identified as tax exempt (<i>E</i>) or as a reseller (<i>R</i>); otherwise, the tax identification number does not control taxability. Any combination of letters, numbers, or special characters is accepted. Alphanumeric, 30 positions; required if customer is defined as tax exempt or as a reseller; optional or required based on Tax code.
Expiration date	The date the customer's exempt or reseller tax identification number expires in this state. This expiration date applies only if there is not an Expiration date (Tax identification expiration date) specified at the customer level. Numeric, 6 positions (in user date format); optional.

Working with Pay Type Exclusions

Purpose: You assign pay type exclusions on a customer-by-customer basis to restrict a customer from using a specific payment method, such as a credit card or check.

In this topic:

- [Exclude Pay Types By Customer Screen](#)
- [Create Pay Type Exclusion/Customer Screen](#)

Exclude Pay Types By Customer Screen

How to display this screen: At any Work with Customers screen, select *Pay type excl.* for a customer. See [Selecting Customers](#). You can also display this screen by selecting *Pay Type Excl.* at a Create/Change/Display Customer screen; see [Creating and Updating Sold-to Customers \(WCST\)](#).

Field	Description
Pay type	A user-defined code that represents the method of payment on an order. Pay type must conform to one of the following categories: • Cash/Check • Credit card The pay type description appears on the right, and is display-only. See Working with Pay Types (WPAY). Numeric, 2 positions; optional.

Screen Option	Procedure
Create a pay type exclusion	Select <i>Create</i> to advance to the Create Pay Type Exclusion/Customer Screen .
Delete a pay type exclusion	Select <i>Delete</i> for a pay type exclusion to delete it. When you delete a pay type listed on this screen, the customer may immediately use the payment method that was previously excluded.

Create Pay Type Exclusion/Customer Screen

Create a pay type exclusion: At the [Exclude Pay Types By Customer Screen](#), select *Create* to advance to this screen.

Field	Description
Customer (Sold-to customer number)	A unique number the system assigns to each customer who places an order. You cannot change this number. Numeric, 9 positions; display-only, assigned by the system.
Customer name (Unlabeled field to the right of the customer number)	The last and first names, and middle initial of the sold-to customer. Last name The customer's last name. Alphanumeric, 25 positions; display-only. First name The customer's first name. Alphanumeric, 15 positions; display-only. Initial The initial of the customer's middle name. Alphanumeric, 1 position; display-only.
Pay type	A user-defined code that represents the method of payment on an order. Pay type must conform to one of the following categories: • Cash/Check • Credit card See Working with Pay Types (WPAY). Numeric, 2 positions; required.

Reviewing Customer History

Purpose: Through the Customer Maintenance option, you can review a customer's mail, item, item class, and order history, which the system collects automatically as updates occur. History for both the sold-to and ship-to customers is available.

In this topic:

- [Related System Control Values](#)
- [Displaying Customer History Screens](#)
- [Display Customer Mail History Screen](#)
- [Item, Item Class, and Order History Screen Flow](#)
- [Ship-to Customer History Screen Flow](#)
- [Customer Sold To Item History Screen](#)
- [Order Billing History Detail Screen](#)
- [About Entry/Maintenance Codes](#)
- [Order/Billing History for an Order](#)
- [Display Customer Order History Screen](#)
- [Display Customer Item Class Screen](#)
- [Display Customer Item Class History Screen \(Reviewing Detail\)](#)
- [Customer Sold To Order History Screen \(Reviewing Detail\)](#)
- [Display Customer Order/Entity History Screen](#)
- [Display Customer Entity History Screen \(Reviewing Order Detail\)](#)
- [Display Customer Item Class Entity Screen \(Reviewing History\)](#)
- [Display Customer Item Class Entity Details Screen \(Reviewing History\)](#)
- [Display Ship To Item History Screen](#)
- [Display Ship To Order History Screen](#)
- [Display Ship To Order History Details Screen](#)
- [Display Ship To Order/Entity History Screen](#)
- [Display Ship To Entity History Screen \(Order History Details by Entity\)](#)

Related System Control Values

Overview: The following system control values affect how the system updates demand for orders.

If using multiple currencies: If you process orders in multiple currencies based on the offer (the [Multi Currency by Offer \(E03\)](#) system control value is *selected*), each of the dollar values that display on these screens will be converted into your local currency.

If using VAT and tax-inclusive pricing: If the [Tax Included in Price \(E70\)](#) system control value is *selected*, certain orders may be subject to tax-inclusive pricing and VAT. In this case, you charge the customer the tax-inclusive price for items on an order, and include a hidden tax amount on the order detail line for the item rather than including tax in the Tax bucket on the order. The hidden tax may be calculated as a percentage of the item price, or may be a fixed amount.

If you use VAT and tax-inclusive pricing, the dollar value that appears on most fields described in this topic will be net of any hidden tax for the item. In other words:

Total = (Tax-inclusive price - Hidden tax) * Quantity

In cases where you have defined the hidden tax to charge for an item as a fixed amount, it is possible for the order total to represent a credit if the hidden tax amount exceeds the item price -- for example, if you offer the item as an incentive or free gift.

Demand for order maintenance: [Update Demand for Order Maintenance Transactions \(C72\)](#): Possible settings are:

- **Y:** The system increases the customer's demand history (in the Orders buckets) for items you add or quantities you increase in order maintenance.
- **N:** Demand does not update for additions in order maintenance; however, all other order history updates, such as for shipments (in the Sales buckets), returns, exchanges, cancellations, and soldouts, will still take place. In this situation, the customer's life-to-date sales (or other activity) may be greater than the customer's order (demand) history.

Demand for non-inventory items: Possible settings are:

- **ALL:** All updates take place for non-inventory items in the same way as for inventory items.
- **ITEM:** The Order/Billing History record updates. Also, you will be able to review order records for non-inventory items at the [Customer Sold To Item History Screen](#), [Display Customer Item Class Screen](#), [Display Customer Item Class History Screen \(Reviewing Detail\)](#), and [Customer Sold To Order History Screen \(Reviewing Detail\)](#) in the same way as you review records for inventory items. However, the Customer Sold To Order History screen will not reflect orders for non-inventory items in the Life-to-date order total fields or the Last order amount.
- **NONE:** There are no demand updates for non-inventory items.

Track at entity level: The [Track Customer History at Entity Level \(F89\)](#) system control value controls whether a customer's order, item, and item class history is broken out based on the entity associated with each order. The system determines the entity associated with an order based on the source code on the order header.

If this system control value is *selected*, you can advance to additional screens to review entity-level history. If this system control value is *unselected*, these screens are not available, and all customer history is consolidated at the customer level.

Displaying Customer History Screens

Access: You can display the Main History, Item History, or Order History screens from any Work with Customers screen, such as from the Work with Customers by Last Name screen. See [Selecting Customers](#).

You can also display these screens by selecting the Mail History, Item History, or Order History options at any Create, Change, or Display Customer screen in customer maintenance. See [Creating and Updating Sold-to Customers \(WCST\)](#).

Display Customer Mail History Screen

Purpose: Use this screen to review the offers sent to the customer. This screen lists the source codes associated with each offer mailed to that customer. The source codes are listed in reverse chronological order (most recent to oldest).

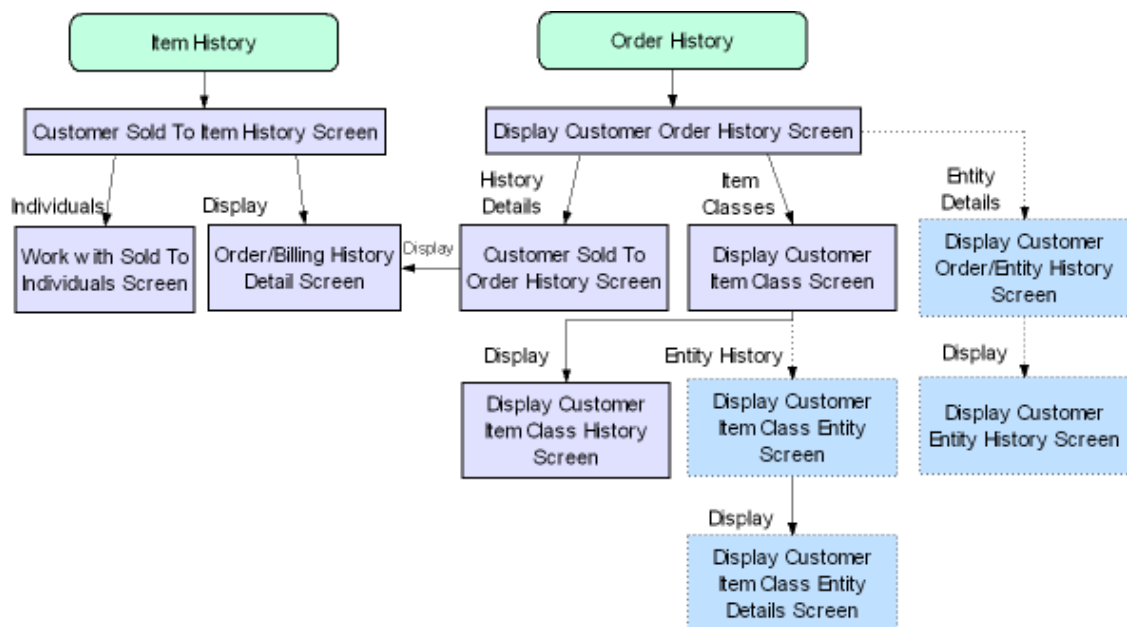
You generate customer mail history by processing a catalog request for a customer. See [Processing Catalog Requests \(PCAT\)](#).

How to display this screen: At a Work with Customers scan screen, select *Mail History* for a customer; see [Selecting Customers](#). You can also display this screen by selecting *Mail History* at a Create, Change, or Display Customer Sold To screen; see [Creating and Updating Sold-to Customers \(WCST\)](#).

Field	Description
Customer #	A unique number to identify a customer. Numeric, 9 positions; display-only, assigned by the system.
Customer name (Unlabeled field to the right of the customer number)	The name of a customer and/or the business associated with the customer. Alphanumeric, 41 positions; display-only.
Source	A code used to identify the segment of your customer base for a particular offer. Alphanumeric, 7 positions; optional.
Description	The description of the mailing. Alphanumeric, 30 positions; display-only.
Mail date	The date you mailed the offer (catalog) to the customer. Numeric, 6 positions (in user date format); display-only.

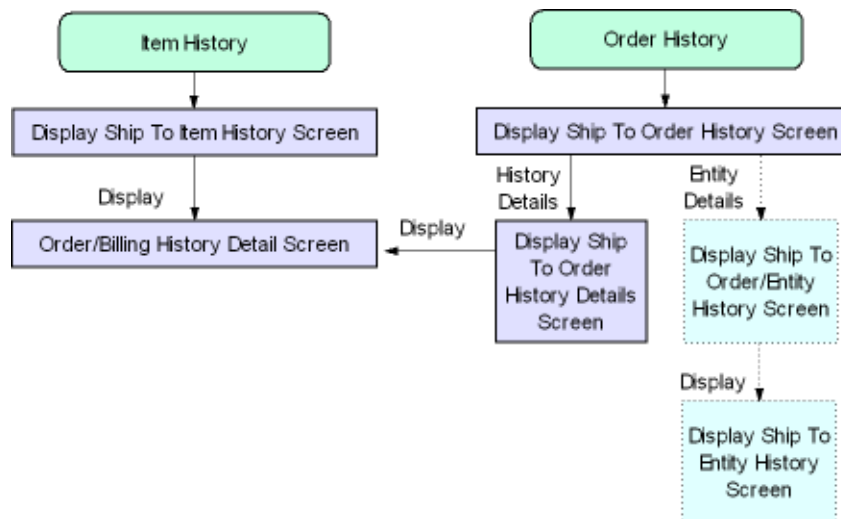
Item, Item Class, and Order History Screen Flow

Purpose: This chart presents the order of the screens you use to review item, item class, and order history for a sold-to customer.



Ship-to Customer History Screen Flow

Purpose: The chart below presents the order of the screens you use to review item and order history for a ship-to customer.



Customer Sold To Item History Screen

Purpose: Use this screen to review the items ordered by the customer. This screen displays the records in the Order/Billing History table for each type of transaction involving the item, such as a shipment, return, or exchange.

Quotes: This screen does not include items included on quotes for the customer; see [Entering Pre-Order Quotes](#).

You can advance to this screen only if the [Track item history](#) field for the sold-to customer is set to 2 (track sold-to item history) or 3 (track sold-to and ship-to item history); however, the system continues to track item history regardless of this setting.

How to display this screen: At a Work with Customer screen, select *Item history* for a customer (see [Selecting Customers](#)) or select *Item History* at a Create, Change, or Display Customer Sold To screen (see [Creating and Updating Sold-to Customers \(WCST\)](#)).

Field	Description
Customer #	A unique number to identify a customer. Numeric, 9 positions; display-only, assigned by the system.
Customer name (Unlabeled field to the right of the customer number)	The name of the customer and/or the company associated with the customer. Alphanumeric, 41 positions; display-only.
Item	The item involved in the transaction. There are separate records for each transaction. Transactions listed on this screen include entering, canceling, selling out, shipping, returning, exchanging, or changing item quantity or price. The system lists items in alphanumeric order, and transactions for each item in reverse chronological order. The item description appears below the item code. Alphanumeric, 12 positions; optional.
SKU (Stock keeping unit)	The item's unique characteristics, such as its color or size. The SKU description appears below the Quantity ordered. Alphanumeric, three 4-position fields; optional.
Date	The date of the transaction. Numeric, 6 positions (in user date format); optional.

Field	Description
Qty ord (Quantity ordered)	The quantity of the item ordered by the customer. If the transaction does not represent an order (for example, a return or shipment), no quantity displays. Numeric, 5 positions; optional.
Order total	The total merchandise dollar amount of the item ordered by the customer on this date. This total does not include freight, tax, handling, or other additional charges, and displays only if the transaction represents an order (as opposed to a return or a shipment, for example). If the Update Demand for Order Maintenance Transactions (C72) system control value is not <i>selected</i> , an order total appears only next to items entered through order entry. Numeric, 13 positions with a 2-place decimal; optional.
Con (Consolidated?)	This flag indicates if the order billing history record for the item has been consolidated. Valid values are: <i>Selected</i> = This item's history has been consolidated <i>Unselected</i> = This item's history has not been consolidated. You can consolidate order billing history records to save space on your system and improve performance. When you consolidate order billing history, you select one or more fields to retain; for example, if you retain customer sold-to number only, all activity for all items for the customer is consolidated into one record, and the amounts are added or netted together. Consolidated records appear on this screen only if you selected to retain the item information. See Consolidating Order Billing History (MOBH) .

Screen Option	Procedure
Review detail information about the item transaction	Select <i>Display</i> for a record to advance to the Order Billing History Detail Screen .

Order Billing History Detail Screen

Purpose: Use this screen to review detailed history for each transaction against an item on an order. The system creates order/billing history records through transactions you enter in order entry, order maintenance, billing, processing auto soldouts, processing item substitutions, or any other transaction against an item on an order. The order and billing asynchronous jobs process most of these updates; see [Working with the ORDR_ASYNC Job](#).

Quotes: This screen does not include items included on quotes for the customer; see [Entering Pre-Order Quotes](#).

How to display this screen: At the [Customer Sold To Item History Screen](#), select *Display* for the item you want to review, or select *Display* for a record at the [Customer Sold To Order History Screen \(Reviewing Detail\)](#).

Field	Description
Customer number	A unique number to identify a customer. Numeric, 9 positions; display-only.

Field	Description
Customer name (Unlabeled field to the right of the customer number)	The customer's name and/or the company associated with the customer. Alphanumeric, 41 positions; display-only.
Ship to #	The number assigned to each shipping address on the order. Numeric, 3 positions; display-only.
Salesman #	A number that identifies the sales representative credited for the order. See Working with Sales Representatives (WSLS) . Numeric, 7 positions; display-only.
Offer number	The code for the catalog, space, or television advertisement from which the customer ordered the item. See Working with Offers (WOFR) . Alphanumeric, 3 positions; display-only.
Description (Unlabeled field to the right of the	The description associated with the offer. Alphanumeric, 30 positions; display-only.
Source code	A code that identifies a segment of your customer base. The source code from the order header appears here, unless you overrode the source code at the order entry detail line. See Working with Source Codes (WSRC) . Alphanumeric, 7 positions; display-only.
Description (Unlabeled field to the right of the	The description associated with the source code. Alphanumeric, 30 positions; display-only.
Item number	A code representing a unit of inventory. Alphanumeric, 12 positions; display-only.
Description (Unlabeled field to the right of the	The description associated with the item. Alphanumeric, 120 positions; display-only.
SKU code (Stock keeping unit)	The item's unique characteristics, such as its size or color. Alphanumeric, three 4-position fields; display-only.
Description (Unlabeled field to the right of the	The description associated with the SKU. The item description appears here for non SKU'ed items. Alphanumeric, 120 positions (item) or 40 positions (SKU); display-only.
Item class	The item class assigned to the item. See Working with Item Classes (WICL) . Numeric, 3 positions; display-only.
Description (Unlabeled field to the right of the	The description associated with the item class. Alphanumeric, 40 positions; display-only.
Ship via code	A code for the carrier to deliver the item to the customer. See Working with Ship Via Codes (WVIA) . Numeric, 2 positions; display-only.
Description (Unlabeled field to the right of the	The description associated with the ship via code. Alphanumeric, 40 positions; display-only.

Field	Description
Long SKU dpt/cls	Two fields used to group items for reporting purposes. Long SKU Department A code, typically used in a retail environment, which represents a department code for this SKU. You can assign this code at both the item and the SKU level; the code assigned to the SKU overrides the item-level code. Department codes are defined in and validated against the Long SKU Department table; see Working with Long SKU Departments (WLSD). Numeric, 4 positions; display-only. Long SKU Class A code, typically used in a retail environment, that represents a class code for this SKU. You can assign this code at both the item and the SKU level; the code assigned to the SKU overrides the item-level code. Long SKU class codes are defined in and validated against the Long SKU Class table; see Working with Long SKU Classes (WLSC). Numeric, 4 positions; display-only.
Descriptions (Long SKU department description/Long SKU class description)	The first 20 positions of the descriptions associated with the long SKU department and long SKU class codes assigned to the SKU. Alphanumeric, 20 positions; display-only.
Order number	The number of the order on which the customer ordered the item. Numeric, 8 positions; display-only.
Entry/Maintenance code	A code indicating the type of transaction performed on this item. Valid values are: • <i>B</i> = Billing (can include sales, exchanges, and returns, including returns you enter through order entry) • <i>M</i> = Maintenance (can include orders, changes, cancellations, and sellouts) • <i>E</i> = Entry (can include orders and sellouts) See About Entry/Maintenance Codes. Alphanumeric, 1 positions; display-only.
Entity	The code representing the entity associated with the source code on order header. Each source code is associated with an entity through its division. Entities are defined in and validated against the Entity table. See Working with Entities (WENT). Numeric, 3 positions; display-only.
Transaction date	The date when the transaction occurred. Note: Transactions that take place on the same day may be consolidated into the same Order/Billing History record if the key fields to the transactions are the same. For example, if a customer adds an item to the order and then cancels it the same day, both transactions will appear on the same Order/Billing History record. Numeric, 6 positions (in user date format); display-only.
Consolidated from...	The date of the earliest record that was used to derive the totals for the consolidated record. If a record has been consolidated, any fields not retained in the consolidation appear blank. This information appears only for consolidated records; see Consolidating Order Billing History (MOBH). Numeric, 6 positions (in user date format); display-only.

Field	Description
Consolidated to...	The date of the latest record that was used to derive the totals for the consolidated record. Numeric, 6 positions (in user date format); display-only. Note: Each of the Total amount fields below represents the merchandise amount net of hidden tax if you use VAT and tax-inclusive pricing. In addition, if you process orders in multiple currencies based on offer, each amount has been converted into your local currency. See the beginning of this topic for more information. If the record has been consolidated, the totals represent the net for all records used to derive the consolidated record.
Quantity ordered	Total quantity of the item added to the order on the date shown. Note: If this field is blank, but there is an order amount, the transaction represents changing the price of an item.
\$ ordered	Numeric, 5 positions; display-only. The merchandise dollar amount ordered for this item on the date shown. This does not include tax, freight, or additional charges. <i>When does this field update?</i> The orders amount and quantity fields update for transactions that represent adding an item to the order for any reason, including free gifts, incentive or promotional items, or replacement items when you process an exchange. <i>If this field is blank:</i> This field will be blank if: - the Update Demand for Order Maintenance Transactions (C72) system control value is <i>unselected</i> and the transaction represents adding an item in order maintenance - the items is free of charge - for items that you return through order entry (using a negative quantity); there will be both an entry and a billing transaction for such an item - the transaction does not represent adding an item to an order Cancel: If the cancel reason used to cancel the item is set to update demand (Reduce demand? = <i>Selected</i>), the cancellation total for the item appears here as a credit (CR), and the number of units canceled appears in the <i>Quantity ordered</i> field. Additionally, the Canceled fields will not be updated for the item. If you use a cancel reason that is not set to update demand, the totals appear in the Canceled fields rather than the Orders fields, and the dollar total will be a positive number. See Establishing Cancel Reason Codes (WCNR). Numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
Cancels total #	Total quantity of the item canceled. A quantity indicates that the cancel reason used on the order did not update demand. See Establishing Return Reason Codes (WTR). Methods for canceling items include order maintenance, Processing Item Substitutions (PSUB), and Working with Backorders Pending Cancellation (WBPC). Numeric, 5 positions; display-only.
\$ canceled	The total merchandise value of canceled units, not including tax, freight, or additional charges. An amount indicates that the cancel reason used on the order did not update demand. Numeric, 20 positions with a 2-place decimal; display-only.
Quantity sold out	Total quantity of the item sold out on the date shown. Numeric, 5 positions; display-only.
\$ sold out	The total merchandise value of soldout units, not including tax, freight, or additional charges. These fields are updated on the transaction that represents: - adding a soldout item in order entry or order maintenance. In this situation, the order total amount and dollars update as well as the soldout amount and dollars. However, if the Update Demand for Order Maintenance Transactions (C72) system control value is not <i>selected</i>, only the soldout fields will update for items you add in order maintenance. - processing auto soldouts. See Processing Auto Soldout Cancellations (MASO). Numeric, 20 positions with a 2-place decimal; display-only.
Quantity sold	Total quantity of this item shipped on the date shown. Numeric, 5 positions; display-only.
\$ shipped	Total merchandise dollar amount of the item you are reviewing shipped to the customer on the date shown. Numeric, 20 positions with a 2-place decimal; display-only.
# sales	The total number of shipments to this customer for this date and item. Numeric, 5 positions; display-only.
Quantity returned	Total quantity of this item returned on the date and for the order shown. See Order/Billing History for an Order for additional information. Numeric, 5 positions; display-only.
\$ returned	The total merchandise value of returned units, not including tax, freight, or additional charges. See Order/Billing History for an Order for additional information. Numeric, 20 positions with a 2-place decimal; display-only.
# ret (Number of returns)	Total number of orders related to the return transaction. This number will never be more than one. See Order/Billing History for an Order for additional information. Numeric, 5 positions; display-only.
Quantity exchanged (Exchanges total quantity)	Total quantity of this item exchanged on the date shown. This field is updated for the billing transaction that represents returning the original item for exchange. Numeric, 5 positions; display-only.

Field	Description
\$ exchanged	The total merchandise value of exchanged units, not including tax, freight, or additional charges, based on the price of the original item. This field is updated on the billing transaction that represents returning the original item for exchange. There will also be a maintenance transaction for both the original and the replacement item of the exchange; however, these maintenance transactions will not have any total quantities or dollar amounts. Numeric, 20 positions with a 2-place decimal; display-only.

For more information: See [Order/Billing History for an Order](#) for samples of the order/billing history records produced by a typical order.

About Entry/Maintenance Codes

The Entry/Maintenance code indicates the type of transaction performed on an item. The codes are:

- *B* = Billing
- *M* = Maintenance
- *E* = Entry

Examples: Examples of each type of transaction code are described in the table below.

Transaction Example	Order/Billing History Update
You enter an order for an item in order entry.	The ORDR_ASYNC job creates an entry (<i>E</i>) transaction with the merchandise totals reflected in the Orders fields (<i>\$ ordered</i> and <i>Quantity ordered</i>).
You cancel an item and add another item	The ORDR_ASYNC job creates a maintenance (<i>M</i>) transaction with the merchandise total for the cancel reflected in the Cancels fields (<i>\$ canceled</i> and <i>Cancels total #</i>), and another <i>M</i> transaction for the new item with the merchandise total reflected in the Orders fields (<i>\$ ordered</i> and <i>Quantity ordered</i>).

Note:

The *Quantity ordered* and *\$ ordered* fields update for units added in order maintenance only if the Update Demand for Order Maintenance Transactions (C72) system control value is *selected*; otherwise, the *M* transaction will appear with these fields blank. However, the total amount and quantity billed still increase when you ship and bill these items.

You then ship that item to the customer. The BILL_ASYNC job creates a billing (*B*) transaction with the merchandise total for the shipment reflected in the Sales fields (*# sales*, *Quantity ordered* and *\$ ordered*).

See [Using the ASYNC Jobs \(MBJC\)](#) for more information on the asynchronous (ASYNC) jobs.

Order/Billing History for an Order

There are two transactions for the return:

- a maintenance transaction for entering the return in order maintenance
- a billing transaction for crediting the return.



Note:

For returns created as a new order line for a negative quantity, the system creates a billing transaction for the return only.

Regarding order/billing transactions:

- *Transactions on the same day:* Transactions for the same order, item, and of the same type (i.e., entry, maintenance, or billing) that take place on the same day are consolidated into one record.
- *Adding items in order maintenance:* If the [Update Demand for Order Maintenance Transactions \(C72\)](#) system control value is *unselected*, the order totals fields will not increase for any items you add in order maintenance. The maintenance transactions created in this situation will have no order quantities or amounts.
- *Changing an item price:* If you change the price of an item in order maintenance, you create a maintenance transaction with an order amount equal to the price change but no order quantity if the Update Demand for Order Maintenance Transactions (C72) system control value is *selected*; however, if this system control value is *unselected*, you create a maintenance transaction with no order quantity or amount.
- *Exchanges:* Entering an exchange in order maintenance produces three order/billing transactions:
 - a maintenance transaction to reflect the change to the original item (with no quantity or dollar total);
 - a maintenance transaction to add the replacement item (with order quantity and dollar total if you update demand for order maintenance);
 - a billing transaction to credit the return of the original item (with exchange quantity and total).
- *Item substitution:* Processing a substitution through [Processing Item Substitutions \(PSUB\)](#) produces two maintenance transactions: a cancel for the original item, and an order for the replacement item.

Display Customer Order History Screen

Purpose: Use this screen below to review cumulative and current ordering information for a sold-to customer.



Note:

Depending on the user's authority to credit card information, the system writes a record to the Credit Card Audit table when this screen is displayed.

Quotes: This screen does not include quote information for the sold to customer; see [Entering Pre-Order Quotes](#).

How to display this screen: At a Work with Customers screen, select *Order History* for a customer; see [Selecting Customers](#). Or select *Order History* at a Create, Change or Display Customer Sold To screen (see [Creating and Updating Sold-to Customers \(WCST\)](#)).

Field	Description
Customer #	A unique number used to identify the customer you are reviewing. Numeric, 9 positions; display-only.
Customer name (Unlabeled field to the right of the customer number)	The name of the sold-to customer you are reviewing. Alphanumeric, 41 positions; display-only.
On order	The total dollar value of all open, unshipped orders for this customer, <i>including</i> charges for merchandise, freight, tax, special handling, and shipping. <i>Cancels:</i> This field subtracts the value of a canceled order/item. <i>Soldouts:</i> This field does not include the amount of soldout items on an order. <i>Exchanges:</i> This field includes the amount of exchange items on an order and is decreased once the exchange item ships. <i>Negative order entry returns:</i> The system includes the dollar amount associated with returns entered as a negative order quantity in Order Entry if the order total is a positive amount; in this situation, the system updates the On order with the positive order total. When the system ships the regular items on the order, the system reduces the On order amount by the shipped order amount. If the order total is a negative amount, the system does not update the On order amount. When the system ships the regular items on the order, the system reduces the On order amount by the shipped order amount. <i>Example 1:</i> If an order contains a return entered as a negative quantity for \$30.00 and a regular item to ship for \$50.00, the system updates the On order for the customer to \$20.00 (\$50.00 to ship - \$30.00 for return = \$20.00). Once the regular item ships, the system decreases the On order by the shipped order amount (\$50.00). <i>Example 2:</i> If an order contains a return entered as a negative quantity for \$60.00 and a regular item to ship for \$50.00, the system does not update the On order for the customer (\$50.00 to ship - \$60.00 for return = \$-10.00). When the regular item ships, the system decreases the On order by the shipped order amount (\$50.00).

 Note:

The On Order amount is not net of hidden tax; see [Related System Control Values](#) for more information on VAT.

If you suspect the on order amount is incorrect, you can use the [Resetting Customer Sold To Amount On Order \(RONO\)](#) menu option to reset the on order amount.

Numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
Active since	The date of the customer's first order. The system uses the value in the Order date field in Order Entry. Numeric, 6 positions (in user date format); display-only, updated by the system.

**Note:**

Each of the Amount fields described below represents the actual purchase price of merchandise only after applying any discounts, price overrides, or other repricing. However, if you use tax-inclusive pricing and VAT, amounts described below are net of hidden tax. In addition, if you process orders by multiple currencies based on offer, each amount has been converted into your local currency. See the beginning of this topic for more information.

Life-to-date Orders quantity

The BILL_ASYNC and ORDR_ASYNC background jobs update order history; see [Operating the Background Jobs](#) for more information.

Non-inventory items: The [Demand Update for Non-Inventoried Items \(E59\)](#) system control value controls whether the following totals are updated for non-inventory items.

The gross number of orders placed by this customer.

Updates:

If the Update Demand for Order Maintenance Transactions (C72) system control value is *selected*, this field increases when you add a detail line(s) to an order in Order Maintenance.

If the Update Demand for Order Maintenance Transactions (C72) system control value is *unselected*, this field does not update when you add a detail line(s) to an order in Order Maintenance.

Cancellations: This total reduces when you cancel an order only if you enter a cancel reason set to update demand; otherwise, the orders quantity remains the same and the [Cancels quantity](#) total increases.

The total does not increase when you enter a return through order entry or enter an exchange item on an order that is already open or held.

Numeric, 5 positions; display-only.

Field	Description
Orders amount	The total merchandise value of the orders placed by the customer, including any backordered or soldout items. This total does not reflect returns created through order entry. Updates: If the Update Demand for Order Maintenance Transactions (C72) system control value is <i>selected</i>, this field updates when you add a detail line(s) to an order in Order Maintenance. When you enter an exchange, the price of the exchange (replacement) item is added. If the Update Demand for Order Maintenance Transactions (C72) system control value is <i>N</i>, this field does not update when you add a detail line(s) to an order in Order Maintenance, including an exchange item. Cancellations: This total reduces when you cancel an order only if you enter a cancel reason set to update demand; otherwise, the orders amount remains the same and the <i>Cancels amount</i> increases. Numeric, 20 positions with a 2-place decimal; display-only.
Sales quantity	The number of shipments to the customer. This total may be larger than the orders quantity if the Update Demand for Order Maintenance Transactions (C72) system control value is <i>unselected</i>, and you have added any items to this customer's orders in order maintenance. If an order has partial shipments on different days, each shipment updates the sales quantity; however, if two shipments occur on the same day, the sales quantity is increased just by 1. Numeric, 5 positions; display-only.
Sales amount	The total merchandise dollar value of orders shipped to the customer. This total may be larger than the orders amount if the Update Demand for Order Maintenance Transactions (C72) system control value is <i>unselected</i>, and you have added any items to this customer's orders in order maintenance. Numeric, 20 positions with a 2-place decimal; display-only.
Returns quantity	The number of returns processed for the customer, including returns you process by entering a negative quantity in order entry or crediting a return through the return authorizations suite of functions (see <i>Managing Returns</i>). If you enter multiple returns during a single order entry, order maintenance, or return authorizations session, the quantity is increased just 1.

**Note:**

If you use the return authorizations suite, this total is updated when you credit the return.

Numeric, 5 positions; display-only.

Field	Description
Returns amount	The total merchandise dollar value of items returned by the customer, including returns you process by entering a negative quantity in order entry or through the return authorizations suite of functions (see Managing Returns).
	 Note: If you use the return authorizations suite, this total is updated when you credit the return.
Cancels quantity	Numeric, 20 positions with a 2-place decimal; display-only. The number of orders or order lines canceled by the customer. If you cancel multiple items on an order in a single session or cancel the whole order, this total is increased just 1. This total does not include cancellations using a cancel reason whose Update demand field is <i>selected</i>. Methods for canceling items include order maintenance, Processing Item Substitutions (PSUB), and Working with Backorders Pending Cancellation (WBPC).
Cancels amount	Numeric, 5 positions; display-only. The total merchandise dollar value of items canceled by the customer. This total does not include cancellations using a cancel reason whose Update demand field is <i>selected</i>.
Exchanges quantity	Numeric, 20 positions with a 2-place decimal; display-only. The number of exchanges processed for the customer. If you exchange multiple items on an order in a single session, this total is increased just 1.
Exchanges amount	Numeric, 5 positions; display-only. The total merchandise dollar amount of items exchanged by the customer. This amount represents the returned items, not the replacement items.
Soldouts quantity	Numeric, 20 positions with a 2-place decimal; display-only. The number of soldout items ordered by the customer. This includes items sold out automatically during order entry, backordered items sold out through <i>Sell Out</i>, and items sold out automatically through Processing Auto Soldout Cancellations (MASO).
Soldouts amount	Numeric, 5 positions; display-only. Total merchandise dollar amount of soldout items ordered by the customer.
Warranty shipped dollar amount	Numeric, 20 positions with a 2-place decimal; display-only. The total cost of warranty items shipped to the customer. Since warranty items are added to an order at no charge, the system uses the cost defined for the item. If the cost was overridden on the order detail line, the system uses the cost override.

Field	Description
Warranty returned dollar amount	The total cost of warranty items returned or exchanged by the customer. Since warranty items are added to an order at no charge, the system uses the cost defined for the item to determine the warranty returned amount. If the cost was overridden on the order detail line, the system uses the cost override. Numeric, 20 positions with a 2-place decimal; display-only.
Last credit card	This field is not currently implemented.
Exp (Expiration date)	This field is not currently implemented.
Last order type	A code that identifies how the order was received, such as a telephone, mail, fax, etc. Order types are defined in and validated against the Order Type table. See Establishing Order Types (WOTY). Alphanumeric, 1 position; display-only.
Last order date	The date of the most recent order for the customer. The system uses the value in the Order date field in order entry. Numeric, 6 positions (in user date format); display-only.
Last pay type	The payment method used by the customer on the most recent order. If there was more than one pay type on the order, the last payment method entered appears. Pay type codes are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY). Numeric, 2 positions; display-only.
Last order amt	The original dollar value of merchandise on the customer's most recent order. This field does not update to reflect subsequent transactions against the order that changed the order total, such as cancellations, soldouts, or adding items. Zero if the most recent order for the customer was a return through order entry. Numeric, 20 positions with a 2-place decimal; display-only.
Last source	The source code used on the header of the customer's most recent order (even if the order was a return through order entry) or catalog request. The source code identifies a segment of your customer base. You can analyze sales by source code. Additionally, the source code determines the method to calculate freight and pricing on an order. See Working with Source Codes (WSRC). Alphanumeric, 7 positions; display-only.
Last mail date	The most recent date when you mailed an offer (catalog) to the customer. The system updates this field when you print catalog mailing labels through Processing Catalog Requests (PCAT). Numeric, 6 positions (in user date format); display-only.
Ref/Bal due write off	The total amount eligible to be written off (or applied as an additional charge/credit) for the customer from short-paying (balance dues) or over-paying (refunds) orders. Numeric, 20 positions with a 2-place decimal; display-only.

Screen Option	Procedure
Review customer item class history	Select <i>Item Classes</i> to advance to the Display Customer Item Class Screen .

Screen Option	Procedure
Review customer order history detail	Select <i>History Details</i> . See Customer Sold To Order History Screen (Reviewing Detail) .
Review order history by entity	Select <i>Entity Details</i> to advance to the Display Customer Order/Entity History Screen .

**Note:**

This option is available only if the [Track Customer History at Entity Level \(F89\)](#) system control value is selected.

Display Customer Item Class Screen

Purpose: Use this screen to review item classes assigned to an item the customer ordered.

Quotes: This screen does not include items included on quotes for the customer; see [Entering Pre-Order Quotes](#).

How to display this screen: Select *Item Classes* at the [Display Customer Order History Screen](#).

Field	Description
Customer #	A unique number to identify a customer. Numeric, 9 positions; display-only.
Customer name (Unlabeled field to the right of the customer number)	The name of the customer placing the order and/or the company associated with that customer. Alphanumeric, 41 positions; display-only.
Class (Item class)	A code used to group similar items for reporting, merchandising, customer service information, and demand tracking. Item class codes are defined in and validated against the Item Class table. You assign an item class to an item at the first Create or Change Item screen. See Working with Item Classes (WICL) for more information on working with item class; see Working with Existing Items (MITM) for more information on assigning an item to an item class. Alphanumeric, 40 positions; display-only.
Description (Item class description)	The description of the item class. Alphanumeric, 40 positions; display-only.
# of orders	The total number of orders the customer has placed for items in this item class. Numeric, 5 positions; display-only.
# of units	The total number of units the customer has ordered for items in this item class. Numeric, 5 positions; display-only.
LTD total (Life-to-date total)	The dollar total of all merchandise the customer has ordered from this item class to date. Numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
Date of last order	The date when the customer last placed an order for an item from this class, or added an item from this class in order maintenance. Numeric, 6 positions (in user date format); display-only.

Screen Option	Procedure
Review item class history detail	Select <i>Display</i> for an item class to advance to the Display Customer Item Class History Screen (Reviewing Detail) .
Review item class history by entity	Select <i>Entity History</i> for an item class to advance to the Display Customer Item Class Entity Screen (Reviewing History) .

 Note:

This option is available only if the [Track Customer History at Entity Level \(F89\)](#) system control value is *selected*.

Display Customer Item Class History Screen (Reviewing Detail)

Purpose: Use this screen to review the sold-to customer's order and sales history for a particular item class.

Quotes: This screen does not include items included on quotes for the customer; see [Entering Pre-Order Quotes](#).

 Note:

See [Display Customer Order History Screen](#) for more information on how the system calculates order activity totals.

How to display this screen: Select *Display* for an item class at the [Display Customer Item Class Entity Screen \(Reviewing History\)](#).

Field	Description
Customer #	A unique number to identify a customer. Numeric, 9 positions; display-only.
Customer name (Unlabeled field to the right of the customer number)	The name of the customer placing the order and/or the company associated with that customer. Alphanumeric, 41 positions; display-only.

Field	Description
Cls (Item class)	A code used to group similar items for reporting, merchandising, customer service information, and demand tracking. Item class codes are defined in and validated against the Item Class table. You assign an item class to an item at the first Create or Change Item screen. See Working with Item Classes (WICL) for more information on working with item class; see Working with Existing Items (MITM) for more information on assigning an item to an item class. Alphanumeric, 40 positions; display-only.
Description (Item class description)	The description of the item class. Alphanumeric, 40 positions; display-only.
# of orders	The total number of orders the customer has placed for items in this item class. Numeric, 5 positions; display-only.
# of units	The total number of units the customer has ordered for items in this item class. Numeric, 5 positions; display-only.
LTD total (Life-to-date total)	The dollar total of all merchandise the customer has ordered from this item class to date. Numeric, 20 positions with a 2-place decimal; display-only.
Date of last order	The date when the customer last placed an order for an item from this class, or added an item from this class in order maintenance. Numeric, 6 positions (in user date format); display-only.
Life-to-date totals:	
Sales	The total units and merchandise total shipped to the sold-to customer for this item class. Quantity: numeric, 5 positions; display-only. Amount: numeric, 20 positions with a 2-place decimal; display-only.
Returns	The total units and merchandise total returned by the sold-to customer for this item class. Quantity: numeric, 5 positions; display-only. Amount: numeric, 20 positions with a 2-place decimal; display-only.
Cancels	The total units and merchandise total canceled by the sold-to customer for this item class. Quantity: numeric, 5 positions; display-only. Amount: numeric, 20 positions with a 2-place decimal; display-only.
Exchanges	The total units and merchandise total exchanged by (that is, returned for exchange by) the sold-to customer for this item class. Quantity: numeric, 5 positions; display-only. Amount: numeric, 20 positions with a 2-place decimal; display-only.
Sold outs	The total units and merchandise total sold out, either in order entry/maintenance or through process auto soldouts, the sold-to customer for this item class. Quantity: numeric, 5 positions; display-only. Amount: numeric, 20 positions with a 2-place decimal; display-only.

Customer Sold To Order History Screen (Reviewing Detail)

Purpose: This screen displays sales history associated with each order placed by the customer. Each entry on this screen represents an order/billing history transaction; see [Order Billing History Detail Screen](#).

Quotes: This screen does not include quote information for the sold to customer; see [Entering Pre-Order Quotes](#).

How to display this screen: Select *History Details* at the [Display Customer Order History Screen](#).

Field	Description
Tran date (Transaction date)	The date when order or sales activity occurred for the customer. The system lists order or sales activity by date starting with the most recent date. Each entry on this screen represents an order/billing history transaction for an item on an order. The transaction date does not appear for consolidated records. See the following fields. Numeric, 6 positions (in user date format); optional.
Consolidated from	The date of the earliest record that was used to derive the totals for the consolidated record. If a record has been consolidated, any fields not retained in the consolidation appear blank. This information appears only for consolidated records; see Consolidating Order Billing History (MOBH). Numeric, 6 positions (in user date format); display-only.
Consolidated to	The date of the latest record that was used to derive the totals for the consolidated record. See above for more information. Numeric, 6 positions (in user date format); display-only.
Qty (Order quantity)	The total unit quantity of the item ordered. If blank: If the Update Demand for Order Maintenance Transactions (C72) system control value is <i>selected</i>, transactions you enter in order maintenance will appear on this screen. This field and the Amount field are blank for cancellations, returns, exchanges, and sellouts. However, if a cancel reason code whose Update demand field is <i>selected</i> was used, the amount for this field will display. Numeric, 5 positions; optional.
Amount	The total merchandise dollar amount ordered on the date shown. This total does not include freight, handling, or other charges. If blank: If the Update Demand for Order Maintenance Transactions (C72) system control value is <i>selected</i>, transactions you enter in order maintenance will appear on this screen. This field and the Qty (Order quantity) field are blank for cancellations, returns, exchanges, and sellouts. However, if a cancel reason code whose Update demand field is <i>selected</i> was used, the amount for this field will display. Numeric, 13 positions with a 2-place decimal; optional.
Sales Qty (Quantity)	The total number of units shipped on the date shown. Numeric, 5 positions; optional.

Field	Description
Amount	Total merchandise dollar value of shipments for the date shown. Numeric, 13 positions with a 2-place decimal; optional.
Entity	The code representing the entity associated with the source code on order header. Each source code is associated with an entity through its division. Entities are defined in and validated against the Entity table. See Working with Entities (WENT) . Numeric, 3 positions; display-only.

Screen Option	Procedure
Display order history detail	Select <i>Display</i> for a record to advance to the Order Billing History Detail Screen .

Display Customer Order/Entity History Screen

Purpose: Use this screen to review the entities in which the customer has placed orders, and to select an entity for further inquiry.

The system tracks entity history for a customer even if there has not been any order activity (for example, if the customer has requested a catalog); however, the order totals and date of last order will be blank.

Quotes: This screen does not include quote information for the sold to customer; see [Entering Pre-Order Quotes](#).

How to display this screen: Select *Entity Details* at the [Display Customer Order History Screen](#).



Note:

This screen is available only if the Track Customer History at Entity Level (F89) system control value is *selected*.

See [Order Billing History Detail Screen](#) for remaining fields.

Field	Description
Ent (Entity)	A code representing the entity for which the order activity took place. An order is associated with an entity through the source code on the order header; each source code is assigned to a division, and each division points to an entity. Entities are defined in and validated against the Entity table. See Working with Entities (WENT) . Numeric, 3 positions; optional.
Entity description (Unlabeled field to the right of the entity code)	The description of the entity. Alphanumeric, 25 positions; display-only.

Field	Description
LTD order...# of	The gross number of orders placed by this customer in this entity. Updates: If the Update Demand for Order Maintenance Transactions (C72) system control value is <i>selected</i>, this field increases when you add a detail line(s) to an order in Order Maintenance. If the Update Demand for Order Maintenance Transactions (C72) system control value is <i>unselected</i>, this field does not update when you add a detail line(s) to an order in Order Maintenance. <i>Cancellations:</i> This total reduces when you cancel an order only if you enter a cancel reason set to update demand; otherwise, the orders quantity remains the same and the Cancels total increases. <i>Preexisting orders:</i> Orders you entered before the Track Customer History at Entity Level (F89) Level system control value was <i>selected</i> are not included in this total; however, items you added in order maintenance are included if the Update Demand for Order Maintenance Transactions (C72) system control value is <i>selected</i>. Numeric, 5 positions; display-only.
LTD order...amount (Life-to-date order amount)	The merchandise dollar total of orders placed by this customer in this entity. Updates: If the Update Demand for Order Maintenance Transactions (C72) system control value is <i>selected</i>, this field increases when you add a detail line(s) to an order in Order Maintenance. If the Update Demand for Order Maintenance Transactions (C72) system control value is <i>unselected</i>, this field does not update when you add a detail line(s) to an order in Order Maintenance. <i>Cancellations:</i> This total reduces when you cancel an order only if you enter a cancel reason set to update demand; otherwise, the orders quantity remains the same and the Cancels total increases. <i>Preexisting orders:</i> Orders you entered before the Track Customer History at Entity Level (F89) Level system control value was <i>selected</i> are not included in this total; however, items you added in order maintenance are included if the Update Demand for Order Maintenance Transactions (C72) system control value is <i>selected</i>. Numeric, 20 positions with a 2-place decimal; display-only.
Date of last order	The most recent date when you entered an order for this customer in this entity. Numeric, 6 positions (in user date format); display-only.

Screen Option	Procedure
Review customer entity history details	Select <i>Display</i> for an entity to advance to the Display Customer Entity History Screen (Reviewing Order Detail) .

Display Customer Entity History Screen (Reviewing Order Detail)

Purpose: Use this screen to review details about a customer's order history for a particular entity.

The system tracks entity history for a customer even if there has not been any order activity (for example, if the customer has requested a catalog); however, the order totals and date of last order will be blank.

Quotes: This screen does not include quote information for the sold to customer; see [Entering Pre-Order Quotes](#).

How to display this screen: Select *Display* for an entity at the [Display Ship To Order/Entity History Screen](#).

**Note:**

This screen is available only if the [Track Customer History at Entity Level \(F89\)](#) system control value is *selected*.

See [Display Customer Order History Screen](#) and [Display Customer Order/Entity History Screen](#) for additional field descriptions.

**Note:**

Each field on this screen represents history for this customer within this entity only.

Field	Description
Entered date	The date that the first activity for this customer within the entity took place. This activity might be something other than entering an order, such as a return or exchange. Numeric, 6 positions (in user date format); display-only.

Display Customer Item Class Entity Screen (Reviewing History)

Purpose: Use this screen to review customer item class history broken out by entity, or to select an entity for further inquiry.

Quotes: This screen does not include quote information for the sold to customer; see [Entering Pre-Order Quotes](#).

How to display this screen: Select *Item Class Entity* for an item class at the [Display Customer Item Class Screen](#).

**Note:**

This screen is available only if the [Track Customer History at Entity Level \(F89\)](#) system control value is *selected*.

See [Display Customer Item Class Screen](#) and [Display Customer Order/Entity History Screen](#) for field descriptions.

**Note:**

Each field on this screen represents history for this customer within this entity and item class only.

Screen Option	Procedure
Display details about the customer's order history for this item class and entity	Select <i>Display</i> for an entity to advance to the Display Customer Item Class Entity Details Screen (Reviewing History) .

Display Customer Item Class Entity Details Screen (Reviewing History)

Purpose: Use this screen to review detailed information about a customer's order history for a particular item class and entity.

Quotes: This screen does not include quote information for the sold to customer; see [Entering Pre-Order Quotes](#).

How to display this screen: Select *Display* for an entity at the [Display Customer Item Class Entity Screen \(Reviewing History\)](#).



Note:

This screen is available only if the Track Customer History at Entity Level (F89) system control value is *selected*.

See [Display Customer Item Class History Screen \(Reviewing Detail\)](#) and [Display Customer Order/Entity History Screen](#) for field descriptions.



Note:

Each field on this screen represents history for this customer within this entity and item class only.

Display Ship To Item History Screen

Purpose: Use this screen, to review item history for a ship-to customer associated with a sold-to customer.

You can advance to this screen and subsequent screens only if the [Track item history](#) field for the sold-to customer is set to *Sold To + Ship To Track*; however, the system continues to track item history regardless of this setting.

Quotes: This screen does not include quote information for the ship to customer; see [Entering Pre-Order Quotes](#).

How to display this screen: Select *Item History* for a ship to customer at the [Work with Customer Ship Tos Screen](#), which is available by selecting *Item History* at any Create/Change/Display Customer screen in customer maintenance, or by selecting *Item History* for a sold to customer at a customer maintenance scan screen.

Although it includes ship-to item history only, the Display Ship To Item History screen resembles the [Customer Sold To Item History Screen](#); see this screen for remaining field descriptions.

Field	Description
Ship to #	A unique number to identify the ship-to customer for the sold-to customer. There can be up to 999 ship-to customers for a sold-to customer. The customer's name appears to the right of the ship-to number. If there is a company name, this information is included before the name, followed by the word <i>ATTN</i> . Ship-to number: numeric, 3 positions; display-only. Name: alphanumeric, 41 positions; display-only.

Screen Option	Procedure
Display order billing history detail	Select <i>Display</i> for an item to advance to the Order Billing History Detail Screen .

 Note:

The same information is available by selecting the ship to customer's order billing history as by selecting the sold to customer's history.

Display Ship To Order History Screen

Purpose: Use this screen to review order totals for a ship to customer.

Quotes: This screen does not include quote information for the ship to customer; see [Entering Pre-Order Quotes](#).

How to display this screen: Select *Order History* for a ship to customer at the [Work with Customer Ship Tos Screen](#), which is available by selecting *Order History* at any Create/Change/Display Customer screen in customer maintenance, or by selecting *Ship To's* for a sold to customer at a customer maintenance scan screen. See [Creating and Updating Sold-to Customers \(WCST\)](#).

 Note:

You can advance to this screen only if the [Track item history](#) field for the sold-to customer is set to track sold-to and ship-to item history; however, the system continues to track item history regardless of this setting.

Although it includes ship-to customer history only, this screen resembles the [Display Customer Order History Screen](#). See this screen and the [Display Ship To Item History Screen](#) for field descriptions.

 Note:

Each field on this screen represents history for this ship-to customer only.

Display Ship To Order History Details Screen

Purpose: Use this screen to review order detail for a ship to customer, or to select an order detail line for further inquiry. Each entry on this screen represents an order/billing history transaction; see [Order Billing History Detail Screen](#).

Quotes: This screen does not include quote information for the ship to customer; see [Entering Pre-Order Quotes](#).

How to display this screen: Select *History Details* at the [Display Ship To Order History Screen](#).

Note:

You can advance to this screen only if the [Track item history](#) field for the sold-to customer is set to 3 (track sold-to and ship-to item history); however, the system continues to track item history regardless of this setting.

Although it includes ship-to customer order history details only, this screen resembles the [Customer Sold To Order History Screen \(Reviewing Detail\)](#); see this screen for field descriptions.

Note:

Each field on this screen represents history for this ship-to customer only.

Display Ship To Order/Entity History Screen

Purpose: Use this screen to review the entities in which a ship to customer has had order activity, and to select an entity for further inquiry.

Quotes: This screen does not include quote information for the ship to customer; see [Entering Pre-Order Quotes](#).

How to display this screen: Select *Entity Details* at the [Display Ship To Order History Screen](#).

Note:

This screen is available only if the Track Customer History at Entity Level (F89) system control value is *selected*. Also, you can advance to this screen only if the [Track item history](#) field for the sold-to customer is set to *Sold To + Ship To Track* (track sold-to and ship-to item history); however, the system continues to track item history regardless of this setting.

Although it includes ship-to customer order/entity history only, this screen resembles the [Display Customer Order/Entity History Screen](#); see this screen for field descriptions.



Note:

Each field on this screen represents history for this ship-to customer only.

Display Ship To Entity History Screen (Order History Details by Entity)

Purpose: Use this screen to review order history for a particular ship to customer within a particular entity.

Quotes: This screen does not include quote information for the ship to customer; see [Entering Pre-Order Quotes](#).

How to display this screen: Select *Display* for an entity at the [Display Ship To Order/Entity History Screen](#).



Note:

You can advance to this screen only if the [Track item history](#) field for the sold-to customer is set to *Sold To + Ship To Track* (track sold-to and ship-to item history); however, the system continues to track item history regardless of this setting.

Although it includes ship-to customer entity history only, this screen resembles the [Display Customer Entity History Screen \(Reviewing Order Detail\)](#); see this screen for field descriptions.



Note:

Each field on this screen represents history for this ship-to customer only.

Work with User Fields Screen

Purpose: Use the Work with User Fields screen to enter, change, delete or display information in user-defined fields.

The user-defined fields are created through [Setting Up User-Defined Fields \(WUDF\)](#). You can create fields for whatever type of additional information you want to add to the available tables.

How to display this screen:

- Select *User Defined Opt.* for a record at each of the “Work with” screens where user-defined fields are available (see [Setting Up User-Defined Fields \(WUDF\)](#) for a listing), or
- Select *Customer User Defined Fields* at the [More Customer Sold To Options Screen](#) (see [Creating and Updating Sold-to Customers \(WCST\)](#))

Also, this screen may appear automatically when you enter an order for a new customer through Order Entry. See [Setting Up User-Defined Fields \(WUDF\)](#) for more information.

You can enter user-defined fields for customers at this screen in customer maintenance only if the user-defined File Code is *CST* for Customer Sold To.

**Note:**

Only fields identified as “input” fields appear during Order Entry; however, you can display all fields (“input” and “output”) wherever else this screen is available.

Field	Description
Customer #	A unique number to identify the customer who placed the order. Customer numbers are assigned automatically by the system.

**Note:**

This field varies, depending on the type of user-defined field you are working with. See [Setting Up User-Defined Fields \(WUDF\)](#).

Customer name (Unlabeled field to the right of the Customer# field)	Numeric, 9 positions; display-only. The name or company name associated with the customer number.

**Note:**

This field varies, depending on the type of user-defined field you are working with. See [Setting Up User-Defined Fields \(WUDF\)](#).

Field	Alphanumeric, 41 positions; display-only. The label associated with the user-defined field, which may be a field for you to enter a date, text, or a number. The corresponding entry, if any, displays to the right of the field. Numeric Fields Numeric fields appear on the left side of the screen. Numeric, 16 positions. Text Fields Text fields appear in the center of the screen. Alphanumeric, 30 positions. Date Fields Date fields appear on the right side of the screen. Numeric, 6 positions; in user date format.

Screen Option	Procedure
Change a user-defined field	Select <i>Change</i> for a field to advance to the Change User Field Screen .
Delete a user-defined field	Select <i>Delete</i> for a field to delete it.

Screen Option	Procedure
Display a user-defined field	Select <i>Display</i> for a field to advance to the Display User Field screen. You cannot update any information on this screen. See Work with User Fields Screen and Change User Field Screen for field descriptions.

Change User Field Screen

To change: Select *Change* for a user field at the *Work with User Fields Screen* to advance to the Change User Field screen. At this screen, you can:

- enter information in the field, or
- change information in the field, or
- delete information in the field

About this screen: This screen and the Display User Field screen each contain a Key field. This field indicates the sequence number assigned to the field through the [Work with User Defined Field Detail Screen \(Defining the Fields\)](#). This field varies, depending on the type of user-defined field you are working with. See [Setting Up User-Defined Fields \(WUDF\)](#).

Because each field on a User Fields Screen is user-defined, the Key field helps you identify the specific field you want to use. This is necessary, for example, if you are writing your own program or Query that includes a specific field.

See [Work with User Fields Screen](#) for remaining field descriptions.

Reviewing Customer Address Changes

Purpose: When you update a sold-to or ship-to customer name or address, the system records this information in the Customer Address Change table (CSCACP). The system also writes a message line to the Customer Notes table. You can review address changes through the Work with Customers function.

Which changes does the system capture? The system captures name, address and phone number changes to sold-to and ship-to customer records. However, the system does not capture changes to the prefix, suffix, company, and country for sold-to customers in the Customer Address Change table unless other name or address fields are changed at the same time. The system does record changes to these fields for ship-to customers.

Deleted customers: There is no way to review deleted customer records. The system does, however, record customer record deletions in the Customer Address Change table. These records have a status of *D* (unlike other address changes, which have a status of *C*). This information may be useful if you extract information from this table for an outside service who works with your customer list.

In this topic:

- [Display Address Changes Screen](#)
- [Display Previous Address Screen \(Comparing Current and Previous Addresses\)](#)
- [Edit Customer Notes \(Reviewing Address Change Messages\)](#)

Display Address Changes Screen

How to display this screen:

- Select *Previous Addr* for a sold-to customer at a Work with Customer screen, or next to a ship-to customer at the Work with Customer Ship To screen. See [Selecting Customers](#) or [Creating and Updating Ship-to Customers \(WCST\)](#).
- Select Customer Address Change History at the [More Customer Sold To Options Screen](#).

**Note:**

The name and address that display on this screen are the customer's previous address, before applying the update.

The information on this screen is from the customer's previous address, before applying the update. All of the fields on this screen are display-only.

Field	Description
Name	The last and first name of the customer, separated by a comma. The customer name also displays below. Alphanumeric, 25 positions (last name) and 15 positions (first name).
Customer number	A unique number to identify the sold-to customer. Numeric, 9 position; assigned by the system.
Company	The name of the customer's company. The company name also displays below. Alphanumeric, 30 positions.
Date	The date you updated the address. Numeric, 6 positions (in user date format).
Ship to number	The number of a ship-to customer that is associated with the sold-to customer. A zero displays if you are reviewing sold-to customer address changes. Numeric, 3 positions.
Address (Unlabeled fields below the customer or company name)	The customer's address, consisting of: Street address (alphanumeric, 32 positions) City (alphanumeric, 25 positions) State (alphanumeric, 2 positions) Postal code (alphanumeric, 10 positions)

Screen Option	Procedure
Display an address change	Select <i>Display</i> for an address change record to advance to the Display Previous Address Screen (Comparing Current and Previous Addresses) .

Display Previous Address Screen (Comparing Current and Previous Addresses)

Purpose: Use this screen to compare a sold-to or ship-to customer's current address with the customer's address before you updated it.

How to display this screen: Select *Display* for an address change record at the [Display Address Changes Screen](#).

How to use this screen: This screen displays the customer's current name and address on the top portion of the screen, and the customer's name and address before the change on the

bottom portion. If the address update on the screen is the most recent one you have taken for the customer, you can determine what information was changed by comparing the top and bottom portions of the screen. (If you have taken additional updates since the date of the update on the screen, it will not be obvious what information you changed with this update, since the customer's current name and address displays on the top portion of the screen.)

All fields on this screen are display-only.

Field	Description
Current address:	
Customer (Customer number)	A unique number to identify a sold-to customer. Numeric, 9 positions.
Match code	A unique code, composed of portions of the customer's name and address, used for duplicate or fraud checking. See Setting Up Match Codes (MMCH) . Alphanumeric, up to 15 positions.
Entered	The date you added the customer to your customer base. Numeric, 6 positions (in user date format).
Name	The customer's name, consisting of: Prefix The customer's title, such as Ms. or Dr. Alphanumeric, 3 positions. First name The customer's first name. Alphanumeric, 15 positions. Middle initial The customer's middle initial. Alphanumeric, 1 position. Last name The customer's last name. Alphanumeric, 25 positions. Suffix The customer's suffix, such as Junior or III. Alphanumeric, 3 positions.
Company	The name of the customer's company. Alphanumeric, 30 positions.
Street	The customer's street address. Alphanumeric, 32 positions.
Apt/suite	The customer's apartment or suite number. Alphanumeric, 10 positions.
Address	Additional address information. Alphanumeric, three lines of 32 positions each.
Postal code	The customer's postal or zip code. Alphanumeric, 10 positions.
City	The customer's city. Alphanumeric, 25 positions.
St (State)	The customer's state or province. Alphanumeric, 2 positions.

Field	Description
Country	The customer's country. Country codes are defined in and validated against the Country table. See Setting Up the Country Table (WCTY) . Alphanumeric, 3 positions.
Phone numbers	The customer's day, evening, and third (fax or mobile) phone numbers and extensions.
	 Note: The Third Phone Number Type (L53) system control value determines whether the third phone number is labeled the Fax or Mbl (mobile) number.
	You can define a telephone number format for each country to map to the phone numbers operators enter into the system. See Setting Up the Country Table (WCTY). Alphanumeric, one 14-position field (phone number) and one 4-position field (phone extension); optional.
Previous address:	The fields on the previous address portion of the screen that are not described above are:
Change date	The date and time the address was updated. Date: numeric, 6 positions (in user date format). Time: numeric, 6 positions (HHMMSS format).
User	The identification of the user who processed the address change. In the case of an update through an integration layer process (such as the ORDER_IN job), this field identifies the user who started the process. Alphanumeric, 10 positions.
Update	The source of the update. Valid values are: • WCST = Work with Customers • OEOM = Order Entry or Order Maintenance (includes creating orders through the order API) • NCOA = NCOA update • CONV = Conversion • PHON = Updates of phone numbers only, regardless of the source (the system uses this value for sold-to customers only) Alphanumeric, 4 positions; assigned by the system.
Type	The type of customer record. Valid values are: • O = sold-to customer • I = ship-to customer Alphanumeric, 1 position; assigned by the system.

Edit Customer Notes (Reviewing Address Change Messages)

Purpose: The system writes a message to customer notes every time it creates an address update record. The system writes messages for ship-to customers to the related sold-to customer notes, as there are no separate customer notes records for ship-to customers.

You can use customer notes to check when customer address updates were applied, and which operators applied them.

Customer notes have additional uses. See [Edit Customer Notes Screen](#).

How to display this screen:

- select *Notes* for a customer at a Work with Customer screen scan screen; see [Work with Customers Screens \(Selecting a Customer\)](#)
- select *Notes* at the first or second Create or Change Cust Sold To screen (see [Creating and Updating Sold-to Customers \(WCST\)](#))
- in Order Entry, select *Options*, and then select *Notes* for Customer Messages.

Update messages: For most address updates that you process, the system writes the following message to customer notes:

Customer Address Change Was Made

When you update an address through cross-company maintenance, the system writes the following message:

Address Updated - by User Submitted Process

Working with Customer Email Addresses

Purpose: Use the Work with Customer Email Address screen to review and work with the email addresses on record for a sold-to customer, including the one flagged as the primary email address.

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

The primary address also defaults to the order email address. When you first create an email address for a customer, it is flagged as the primary email address, which is stored both at the customer level and in the Customer Sold To Email Address table. Other email addresses on record for the customer are also retained in the Customer Sold To Email Address table.

**Note:**

The ability to store multiple email addresses is available only for sold-to customers. Ship-to customers and bill-to customers can have only one email address on table.

Creating email addresses: You can create an email address for a customer by:

- entering the email address at any screen where the field is enterable, such as order entry, customer maintenance, and catalog requests. The address you enter in customer maintenance is flagged as the customer's primary email address.
- using the [Create Email Address Screen](#) or the [Select Customer Email Address Screen](#). You have the option of flagging the email address as primary.
- loading an order through the generic order interface, and specifying an *order_email*, or in certain situations an *ind_email_address* or a *sold_to_email*. For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

For more information: See [Working with an Order-Level Email Address](#) for more information on how the system updates the Customer Sold To Email Address table, and other email addresses, when creating orders through various methods.

Email Address Validation

When you enter or receive an email address, the system verifies that:

- there is an @ sign and a period (.)
- there is some text:
 - before the @ sign
 - between the @ sign and the period
 - after the period

If the email address does not meet these criteria, the system does not let you create it.

For example, the system would not let you create an email address such as:

- @example.com
- sbrown@example
- sbrown@.org
- www.example.com

Any additional validation? The system does not confirm that your entry represents a valid email address, or that the domain name (such as “example” in example.com) even exists. However, when you work with email addresses at the [Create Email Address Screen](#) or [Select Customer Email Address Screen](#) only, the system does display a warning message if the extension of the email address does not match one of the following:

- .com
- .net
- .gov
- .org
- .mil
- .edu
- .us
- .can
- .uk

You can still create the email address even if it does not use one of the extensions listed above.

In this topic:

- [Work with Customer Email Address Screen](#)
- [Create Email Address Screen](#)
- [Select Customer Email Address Screen](#)
- [Receiving Customer Email Status Updates From an External System](#)
 - [Customer Email Status Updates Setup](#)
 - [Customer Email Status Updates Process](#)

- [Customer Email Update Examples](#)
- [Unmatched Email Status Report](#)

Work with Customer Email Address Screen

Purpose: Use this screen to review or work with the email addresses on file for a sold-to customer. See [Working with Customer Email Addresses](#) for an overview.

How to display this screen: Select Customer Email Addresses at the [More Customer Sold To Options Screen](#) or the [Display More Options Screen](#).

Field	Description
Customer #	A unique number to identify the customer you are currently working with. Numeric, 9 positions; display-only, assigned by the system.
Customer name	The customer's name or company name. Alphanumeric, 41 positions; display-only.
Email address	An email address for the customer, stored in the Customer Sold To Email table. Fraud checking: An order goes on <i>EC</i> hold if this email address matches an email address in the Miscellaneous Fraud table; see Working with Miscellaneous Frauds (WMFF) . Alphanumeric, 50 positions; optional.
Opt in/out	Indicates the preferred method of correspondence. Valid values are: • <i>O1</i> (Email): Email is the preferred method of correspondence. • <i>O2</i> (Order-only email): Use email for order-related correspondence only; generate a document for other correspondence. • <i>O3</i> (No email): Do not use email for any correspondence; generate a document instead. • <i>O4</i> (Do not ask the customer): Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified. Defaults from the Default Opt In/Opt Out Flag (G97) system control value, but you can override it.



Note:

The above values use the letter O, not the number 0 (zero).

The system updates this field for the primary email address when you change the setting of the Opt in/Opt out value at other screens, such as order maintenance, or catalog requests. The opt-in/out setting is updated when you override the setting in order entry only if the email address for the order defaulted from the customer's primary email address.

Field	Description
	Email notifications: See When Does the System Generate an Email Notification? for an overview. Outbound email API: The opt in/opt out settings controls the generation of the <i>Outbound Email XML Message (CWEmailOut)</i> using the same logic as the generation of outbound emails. See <i>Outbound Email API</i> in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).for an overview. Updating from an external system: See Receiving Customer Email Status Updates From an External System for an overview and the required setup. Alphanumeric, 2 positions; required.
Format	Indicates the customer's preference regarding email format. Valid values are: • <i>T</i> = plain text • <i>H</i> = HTML This field is informational only. Alphanumeric, 1 position; display-only.
Primary	An asterisk (*) indicates that this is the customer's primary email address, and this email address is highlighted. The primary address is the one that defaults in order entry. Alphanumeric, 1 position; display-only.

Option	Procedure
Create a new email address for the customer	Select <i>Create</i> to advance to the Create Email Address Screen .
Change an existing email address for the customer	Select <i>Change</i> for an email address to advance to the Change Email Address Screen. You can change the Email address, Display name, Opt in/out field, or the Format. See Create Email Address Screen for field descriptions.
Delete an email address	Select <i>Delete</i> for an email address to delete the email address. You cannot delete the primary email address.
Display an email address	Select <i>Display</i> for an email address to advance to the Display Email Address Screen. You cannot change any information on this screen. See Create Email Address Screen for field descriptions.

Option	Procedure
Mark an email address as the customer's primary email address	Select <i>Mark as primary</i> for an email address to identify it as the customer's primary address. The primary email address is highlighted on this screen, and is the one that defaults in order entry.

 Note:

The system does not validate that the email address is correctly formatted. You can use the [Select Customer Email Address Screen](#) to correct the email address if it is incorrectly formatted.

Create Email Address Screen

Purpose: Use this screen to create an email address for a customer. You can also create an email address by entering the address at any screen where the field is enterable; in this situation, the previous email address is retained in the Customer Sold To Email table.

The system does not automatically flag an email address as primary when you create it at this screen. If the email address is not flagged as primary, you can still delete it, even if it is the only email address for the customer.

How to display this screen: Select *Create* at the [Work with Customer Email Address Screen](#).

Field	Description
Customer number	A unique number to identify the customer you are currently working with. The customer's name or company name displays to the right. Customer number: numeric, 9 positions; display-only, assigned by the system. Customer name: alphanumeric, 41 positions; display-only.
Email address	An address that you can use to send emails to the customer. See Email Address Validation for a discussion of how the system validates email addresses for a customer at this screen and at other screens. Change screen: You can change this field on an existing email address; however, the system does not allow you to create two email address records for a customer if they have identical Email address fields. Alphanumeric, 50 positions; required.
Display name	The name of the customer as displayed in email correspondence. This field is informational only. Alphanumeric, 50 positions; optional.

Field	Description
Opt in/out	Indicates the preferred method of correspondence. Valid values are: • <i>All Emails</i> = Email is the preferred method of correspondence. • <i>Order Emails Only</i> = Use email for order-related correspondence only; generate a document for other correspondence. • <i>No Emails</i> = Do not use email for any correspondence; generate a document instead. • <i>Do Not Ask</i> = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified. Defaults from the <i>Default Opt In/Opt Out Flag (G97)</i> system control value, but you can override it.
	 Note: The above values use the letter O, not the number 0 (zero).
	The system updates this field when you change the setting of the Opt in/Opt out value at any other screen, such as order entry, order maintenance, or catalog requests. Email notifications: See When Does the System Generate an Email Notification? for an overview. Required.
Format	Indicates the customer's preference regarding email format. Valid values are: • <i>Text</i> • <i>HTML</i> This field is informational only. Optional.
Source	Indicates how you obtained the email address. Valid values are: • <i>Customer API</i>: You received the email address through the <i>Generic Customer API</i>. • <i>Customer email</i>: You entered the address at this screen. • <i>Order entry</i>: You received the email while processing a new order (including orders created through the order API), through an e-commerce address update, or entered it for a customer membership recipient. • <i>Customer maintenance</i>: You entered the address at a screen in customer maintenance or received it through a catalog request. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Alphanumeric, 20 positions; display-only.
Create date	The date when the email address record was created. Numeric, 6 positions (in user date format format); display-only.
Create time	The time when the email address record was created. Numeric, 6 positions (HH:MM:SS format); display-only.

Field	Description
Change date	The most recent date when you changed the Email address, Display name, Opt in/out field, or Format. Numeric, 6 positions (in user date format); display-only.
Change time	The most recent time when you changed the Email address, Display name, Opt in/out field, or Format. Numeric, 6 positions (HH:MM:SS format); display-only.
Last primary	The most recent date when the email address was flagged as the primary address. The system flags an email address as the primary address when it is created through customer maintenance or a catalog request, or if it is the first email address for the customer. Numeric, 6 positions (in user date format); display-only.
Last used/customer	The last date when this email address was used by the customer. The system updates this field for the primary email address when you: • create an order for the customer • create a catalog request for the customer • maintain an order for the customer The above updates take place regardless of how the information was received. For example, the system updates this field if you receive an order through the order API or create it through Generating Membership Orders (EGMO) . The system also updates this field when you receive an email from the customer. Numeric, 6 positions (in user date format); display-only.
Last used/system	The last date when the system generated an email to this address. The system updates this field for the primary email address when you generate a notice such as a: • backorder notice email through • soldout notification email through Generating Soldout Notifications (MSON) • shipment confirmation email through Generate Backorder Notices (GBOC)Sending Internet Order Ship Confirmation (ESCF) • credit card credit email through Processing Refunds (MREF) See When Does the System Generate an Email Notification? for a listing of system-generated emails. Numeric, 6 positions (in user date format); display-only.

Select Customer Email Address Screen

Purpose: Use this screen to review existing email addresses for the customer, to select an existing email address as the primary address, or to create a new email address.

Note:

Recipient or gift orders: When you advance to this screen from the order header screen in order entry or order maintenance, the email addresses are associated with the customer who places the order, not the customer receiving the order. To review or work with the recipient's email address or opt-in/out setting, you must advance to the [Expand Name/Address Screen](#).

How to display this screen: You can display this screen by prompting on the email address at various screens, including the:

- [Expand Name/Address Screen](#)
- [Work with Order Screen](#)
- [Create Catalog Request Screen](#)

Field	Description
Customer	A unique number to identify the customer you are currently working with. The customer's name or company name displays to the right. Customer number: numeric, 9 positions; display-only, assigned by the system. Customer name: alphanumeric, 41 positions; display-only.
Email address	An email address for the customer, stored in the Customer Sold To Email table. Alphanumeric, 50 positions; optional.
Opt in/out	Indicates the preferred method of correspondence. Valid values are: • <i>O1</i> = Email is the preferred method of correspondence. • <i>O2</i> = Use email for order-related correspondence only; generate a document for other correspondence. • <i>O3</i> = Do not use email for any correspondence; generate a document instead. • <i>O4</i> = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified. Defaults from the <i>Default Opt In/Opt Out Flag (G97)</i> system control value, but you can override it.

**Note:**

The above values use the letter O, not the number 0 (zero).

The system updates this field when you change the setting of the Opt in/Opt out value at any other screen, such as order entry, order maintenance, or catalog requests.

Email notifications: See [When Does the System Generate an Email Notification?](#) for an overview.

Updating from an external system: See [Receiving Customer Email Status Updates From an External System](#) for an overview and the required setup.

Alphanumeric, 2 positions; required.

Fmt (Format) Indicates the customer's preference regarding email format.
Valid values are:

- *T* = plain text
- *H* = HTML

This field is informational only.
Alphanumeric, 1 position; display-only.

Field	Description
Last primary	The most recent date when the email address was flagged as the primary address. The system flags an email address as the primary address when it is created through customer maintenance or a catalog request, or if it is the first email address for the customer. Numeric, 6 positions (in user date format); display-only.
Current primary	An asterisk (*) indicates that this is the customer's primary email address, and this email address is highlighted. The primary address is the one that defaults in order entry and displays on other screens, such as in customer maintenance. Fraud checking: An order goes on <i>EC</i> hold if this email address matches an email address in the Miscellaneous Fraud table; see Working with Miscellaneous Frauds (WMFF) . Alphanumeric, 1 position; display-only.

Option	Procedure
Create a new email address	Select <i>Create</i> to advance to the Create Email Address Screen .
Select an email address	Select an email address to flag it as the primary email address. See the Current primary field above for more information.
Change an email address	Select <i>Change</i> for an email address to advance to the Select Customer Email Address Screen .
Delete an email address	Select <i>Delete</i> for an email address to delete it. You cannot delete the primary email address.
Flag an email address as primary	Select <i>Mark as primary</i> for an email address to flag it as the primary.

Receiving Customer Email Status Updates From an External System

Overview: Use the Customer Email Status Updates process to match a record in the [Customer Email Updates Table](#) to a sold to customer and update the sold to customer's Opt in/opt out field with the opt in/opt out value defined for the customer email update record.



Note:

The Customer Email Status Updates process allows you to update the Opt in/opt out setting for a sold to customer at the customer sold to level (Customer Sold To table) and/or customer sold to email level (Customer Sold To Email table). See [Determining the Opt-in/out Setting](#) for more information on the hierarchy the system uses to determine the opt-in/out setting to use when generating emails.

For more information:

- [Customer Email Status Updates Setup](#): provides the setup you must complete before you can use the Customer Email Updates process.
- [Customer Email Status Updates Process](#): describes the steps the system performs during the Customer Email Status Updates process.

- [Customer Email Update Examples](#): provides examples of the Customer Email Status Updates process.

Customer Email Status Updates Setup

Before you can run the [Customer Email Status Updates Process](#), you must complete the required setup.

- [Process Email Status Updates Periodic Function](#)
- [Customer Email Updates Table](#)

Process Email Status Updates Periodic Function

Use the [Working with Periodic Functions \(WPER\)](#) menu option to create a periodic function for the Customer Email Status Updates process.

Setting	Example
Function	EMAILUD
Description	PROCESS EMAIL UPDATE
Company parameter	Selected
Appl Area	ALL
Program Name	PFR0089

Once you have created the periodic function:

- Use the [Working with Periodic Processes \(WPPR\)](#) menu option to assign the periodic function to a periodic process.
- Use the Execute Periodic Process screen (located in the [Working with Periodic Processes \(WPPR\)](#) or [Executing Periodic Processes \(EPRO\)](#) menu option) to define a schedule for the process.

Customer Email Updates Table

Use this table to update an existing sold to customer's Opt in/opt out field from an external system. You must populate this table before running the [Customer Email Status Updates Process](#) in order to match a sold to customer to a record in the Customer Email Updates table.

Creating a record: When you initially populate this table from an external system, each record should contain the following information:

- [Company](#): Required; used to match the record to a sold to customer.
- [Email Addr](#): Required; used to match the record to a sold to customer.
- [Customer Nbr](#): Leave blank; the Customer Email Status Updates Process updates this field when it finds an exact match to a sold to customer.
- [Profile ID](#): Optional.
- [First Name](#): Required; used to match the record to a sold to customer.
- [Last Name](#): Required; used to match the record to a sold to customer.
- [Email Status](#): Required; the Customer Email Status Updates Process updates the sold to customer's Opt in/opt out field for the associated email address with this value.
- [Submit Date](#): Required.

- **Process Status:** Leave blank; the Customer Email Status Updates Process updates this field after the record has been processed.

Field	Description
Company	A code for the company where the sold to customer whose Opt in/opt out field you wish to update is located. Company codes are defined in and validated against the Company table. Numeric, 3 positions; Required.
Email Addr	The sold to customer's email address. The email address should contain the following formatting: • there is an @ sign and a period (.) • there is some text: • before the @ sign • between the @ sign and the period • after the period For example: kbrown@EXAMPLE.com. The system uses this field to match a sold to customer to a Customer Email Update record. In order to match, one of the following email addresses must exactly match the Email Addr value for a Customer Email Update record: • CST E-mail address value in the Customer Sold To table. • CEM Email Address value in the Customer Sold To Email table. You can review the sold to customer's email address on the following screens: • Second Create Customer Sold To Screen (the customer's primary email address) • Work with Customer Email Address Screen (the customer's primary email address and secondary email addresses) Alphanumeric, 50 positions; Required.
Customer Nbr	The sold to customer number. The Customer Email Status Updates process updates this field when it finds a sold to customer that matches the Customer Email Updates record.
	 Note: If a Customer Nbr is already defined for a customer email updates record when you run the Customer Email Status Updates process, the system ignores this value.
Profile ID	Numeric, 9 positions; Updated by the system. A unique code to identify the sold to customer in an external system. Informational only. Alphanumeric, 15 positions; Optional.

Field	Description
First Name	The first name of the sold to customer. The system uses this field to match a sold to customer to a Customer Email Update record. In order to match, the NAM First Name value in the Customer Sold To table must exactly match the First name value for a Customer Email Update record. You can review the sold to customer's name on the first Change or Display Customer screen; see First Create Sold To Customer Screen. Alphanumeric, 15 positions; Required.
Last Name	The last name of the sold to customer. The system uses this field to match a sold to customer to a Customer Email Update record. In order to match, the NAM Last Name value in the Customer Sold To table must exactly match the Last name value for a Customer Email Update record. You can review the sold to customer's name on the first Change or Display Customer screen; see First Create Sold To Customer Screen. Alphanumeric, 25 positions; Required.

Field	Description
Email Status	Indicates the preferred method of correspondence for the sold to customer's email address. If the Customer Email Status Updates program finds a match between a sold to customer and a Customer Email Updates record, the system updates the sold to customer's Opt in/opt out field with this value. • If the match is found to the sold to customer's email address in the Customer Sold To table, the system updates the CST E-mail Status value in the Customer Sold To table. You can review the updated Opt in/opt out value on the first Change or Display Customer screen; see First Create Sold To Customer Screen. • If the match is found to the sold to customer's email address in the Customer Sold To Email table, the system updates the CEM Email Status value in the Customer Sold To Email table. You can review the Opt in/opt out value on the Work with Customer Email Address Screen. • If the match is found to the sold to customer's email address in the Customer Sold To table and Customer Sold To Email table, the system updates the Email Status value in the Customer Sold To table and Customer Sold To Email table. Valid values are: • <i>O1</i> (Email) = Email is the preferred method of correspondence. • <i>O2</i> (Order-only email) = Use email for order-related correspondence only; generate a document for other correspondence. • <i>O3</i> (No email) = Do not use email for any correspondence; generate a document instead. • <i>O4</i> (Do not ask the customer) = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified.  Note: The above values use the letter O, not the number 0 (zero). Alphanumeric, 2 positions; Required.
Submit Date	The date the external system added this record to the Customer Email Updates table, in CYMMDD format. For example, October 8, 2009 displays as 1091008.  Note: The system does not validate that the date is in the correct format. Numeric, 7 positions; Required.

Field	Description
Process Status	Indicates whether the Customer Email Updates record has been processed. Valid values are: • <i>blank</i> = The Customer Email Status Updates process has not yet processed the Customer Email Updates record. • <i>I</i> = The Customer Email Status Updates process is currently processing the record. • <i>P</i> = The Customer Email Status Updates process has processed the Customer Email Updates record. The setting of the Clear Processed Records from Customer Email Updates Table (K70) system control value controls whether the system retains records in the Customer Email Updates table after the Customer Email Status Updates process is run. Alphanumeric, 1 position; Updated by the system.

Customer Email Status Updates Process

When you submit the Customer Email Status Updates process, the system performs the following steps.

#	Step
1.	Looks at records in the Customer Email Updates Table whose Company matches the company where you submitted the Process Email Status Updates Periodic Function. The system does not process records in the Customer Email Updates table whose Company does not match the company where you submitted the Customer Email Status Updates process.
2.	Determines if the Email Status for a Customer Email Updates record is a valid status. Valid values are: • <i>O1</i> (Email) = Email is the preferred method of correspondence. • <i>O2</i> (Order-only email) = Use email for order-related correspondence only; generate a document for other correspondence. • <i>O3</i> (No email) = Do not use email for any correspondence; generate a document instead. • <i>O4</i> (Do not ask the customer) = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified. If the Email Status for a Customer Email Updates record is not a valid status, the system does not process the record.

#	Step
3.	Tries to match the <i>Email Addr</i>, <i>First Name</i>, and <i>Last Name</i> for the Customer Email Updates record to a sold to customer. See <i>Customer Email Update Examples</i> for examples. Exact match: • If the match is found to the sold to customer's email address in the Customer Sold To table, the system updates the CST E-mail Status value in the Customer Sold To table with the <i>Email Status</i> value from the Customer Email Update table. You can review the updated Opt in/opt out value on the first Change or Display Customer screen; see <i>First Create Sold To Customer Screen</i>. • If the match is found to the sold to customer's email address in the Customer Sold To Email table, the system updates the CEM Email Status value in the Customer Sold To Email table with the <i>Email Status</i> value from the Customer Email Update table. You can review the Opt in/opt out value on the <i>Work with Customer Email Address Screen</i>. • If the match is found to the sold to customer's email address in the Customer Sold To table and Customer Sold To Email table, the system updates the Email Status value in the Customer Sold To table and Customer Sold To Email table. In addition, the system updates the Customer Email Updates record: • Customer Nbr field: Updates with the matched sold to customer number. • Process Status field: Updates to <i>P</i> (Processed). More than one exact match: If more than one sold to customer matches a Customer Email Updates record, the system updates the Opt in/Opt out field for the first sold to customer in numeric order that matches the Customer Email Updates record. For example, if customer 2 and customer 45 match a Customer Email Updates record, the system updates the opt in/opt out setting for customer 2 and not customer 45. No exact match: If an exact match is not found, the system updates the Process Status field for the Customer Email Updates record to <i>P</i> (Processed). The Customer Nbr field for the record remains blank since an exact match was not found and a sold to customer was not updated.
4.	Generates the <i>Unmatched Email Status Report</i>. This report displays all records in the Customer Email Updates table that were processed, but were not matched to a sold to customer. You can use this report to review which sold to customers require an update to the Opt in/opt out field.
5.	Looks at the setting of the <i>Clear Processed Records from Customer Email Updates Table (K70)</i> system control value to determine whether to clear the records in the <i>Customer Email Updates Table</i> once the Customer Email Status Updates process completes. • If <i>selected</i>, the system clears all records in the Customer Email Updates table. • If <i>unselected</i>, the system retains all records in the Customer Email Updates table. Processed records remain in the table with a <i>P</i> (Processed) status. The <i>Customer Email Status Updates Process</i> does not look at records in a <i>P</i> status; in order to reprocess these records, you must update the Process Status field for the record to blank.

Customer Email Update Examples

- *Example 1 - Match at Customer Sold To Level*
- *Example 2 - Match at Customer Sold To Email Level*
- *Example 3 - Match at Customer Sold To and Customer Sold To Email Level*
- *Example 4 - No Match Found*

Example 1 - Match at Customer Sold To Level

The following record exists in the Customer Email Updates table for company 7.

Email Address	First Name	Last Name	Email Status
BROBERTS@EXAMPLE.COM	BERNADETTE	ROBERTS	01

The following records exist in the Customer Sold To table for company 7.

Cust#	Email Address	First Name	Last Name	Opt in/out
2	BROBERTS@EXAMPLE.COM	BERNADETTE	ROBERTS	02
4	BROBERTS@EXAMPLE.COM	BETHANY	ROBERTS	02
6	BROBERTS@EXAMPLE.COM	BERNADETTE	ROBERTS	02

When you run the [Customer Email Status Updates Process](#), the system finds an exact match between the Customer Email Updates record and a Customer Sold To record.

The system:

- Updates the Customer Email Updates record with the sold to customer number:

Email Address	Cust Nbr	First Name	Last Name	Email Status	Process Status
BROBERTS@EXAMPLE.COM	6	BERNADETTE	ROBERTS	01	P

- Updates the Sold To Customer record with the Email Status from the matched Customer Email Updates record.

Cust#	Email Address	First Name	Last Name	Opt in/out
6	BROBERTS@EXAMPLE.COM	BERNADETTE	ROBERTS	01

Example 2 - Match at Customer Sold To Email Level

The following record exists in the Customer Email Updates table for company 7.

Email Addr	First Name	Last Name	Email Status
SJONES@EXAMPLE.COM	SHELDON	JONES	01

The following records exist in the Customer Sold To table for company 7.

Cust#	Email Address	First Name	Last Name	Opt in/out
8	SJONES@EXAMPLE.COM	SHELDON	JONES	02
10	SJONES@EXAMPLE2.COM	SAMANTHA	JONES	02

The following records exist in the Customer Sold To Email table for company 7.

Cust#	Email Address	Opt in/out	Primary
8	SJONES@EXAMPLE.COM	02	Y
8	SJONES@EXAMPLE3.COM	03	N
10	SJONES@MXAMPLE4.COM	02	Y
10	SJONES@EXAMPLE2.COM	03	N

When you run the [Customer Email Status Updates Process](#), the system finds an exact match between the Customer Email Updates record and a Customer Sold To Email record.

The system:

- Updates the Customer Email Updates record with the sold to customer number:

Email Address	Cust Nbr	First Name	Last Name	Email Status	Process Status
SJONES@EXAMPLE.COM	8	SHELDON	JONES	O1	P

Updates the Sold To Customer Email record with the Email Status from the matched Customer Email Updates record.

Cust#	Email Address	Opt in/out	Primary
8	SJONES@EXAMPLE.COM	02	Y
8	SJONES@EXAMPLE2.COM	01	N



Note:

The system does not update the Opt in/opt out defined for the sold to customer in the Customer Sold To table because the email address defined at that level does not match the email address defined for the Customer Email Updates record. The Opt in/opt out for the sold to customer in the Customer Sold To table remains at O2.

Example 3 - Match at Customer Sold To and Customer Sold To Email Level

The following record exists in the Customer Email Updates table for company 7.

Email Address	First Name	Last Name	Email Status
TJOHNSON@EXAMPLE.COM	TINA	JOHNSON	O1

The following records exist in the Customer Sold To table for company 7.

Cust#	Email Address	First Name	Last Name	Opt in/out
8	TJOHNSON@EXAMPLE.COM	TINA	JOHNSON	02
10	TJOHNSONS@EXAMPLE2.COM	TYLER	JOHNSON	02

The following records exist in the Customer Sold To Email table for company 7.

Cust#	Email Address	Opt in/out	Primary
8	TJOHNSON@SAMPLE.COM	02	Y
8	TJOHNSON@EXAMPLE.COM	04	N
10	TJOHNSON@SAMPLE2.COM	02	Y
10	TJOHNSON@EXAMPLE2.COM	03	N

When you run the [Customer Email Status Updates Process](#), the system finds an exact match between the Customer Email Updates record and a Customer Sold To record and its associated Customer Sold To Email record.

The system:

- Updates the Customer Email Updates record with the sold to customer number:

Email Address	Cust Nbr	First Name	Last Name	Email Status	Process Status
TJOHNSON@EXAMPLE.COM	8	TINA	JOHNSON	01	P

Updates the Sold To Customer record and Sold To Customer Email record with the Email Status from the matched Customer Email Updates record.

Sold To Customer record:

Cust#	Email Address	First Name	Last Name	Opt in/out
8	TJOHNSON@SAMPLE.COM	TINA	JOHNSON	01

Sold To Customer Email record:

Cust#	Email Address	Opt in/out	Primary
8	TJOHNSON@SAMPLE2.COM	01	Y

Example 4 - No Match Found

The following record exists in the Customer Email Updates table for company 7.

Email Address	First Name	Last Name	Email Status
NSMITH@EXAMPLE.COM	NONA	SMITH	01

The following records exists in the Customer Sold To table for company 7.

Cust#	Email Address	First Name	Last Name	Opt in/out
12	NSMITH@EXAMPLE2.COM	NONA	SMITH	02
14	NSMITH@EXAMPLE3.COM	NED	SMITH	02

The following records exist in the Customer Sold To Email table for company 7.

Cust#	Email Address	Opt in/out	Primary
12	NSMITH@EXAMPLE2.COM	02	Y
12	NSMITH@EXAMPLE3.COM	03	N
14	NSMITH@EXAMPLE.COM	02	Y
14	NSMITH@EXAMPLE4.COM	03	N

In this situation, the system does not find an exact match between the Customer Email Updates record and a Customer Sold To record or Customer Sold To Email record.

The system updates the Customer Email Updates record:

Email Address	Cust Nbr	First Name	Last Name	Email Status	Process Status
NSMITH@EXAMPLE.COM		NONA	SMITH	01	P

The system does not update a Sold To Customer record or Sold To Customer Email record because a match was not found. The Customer Email Updates record prints on the *Unmatched Email Status Report*.

Working with Customer Ownership

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

In this topic:

- [Remote Entry of Customer Ownership](#)
- [Work with Customer Ownership Screen](#)
- [Create Customer Ownership Screen](#)

Remote Entry of Customer Ownership

You can include customer ownership information in orders from the Order API, catalog requests from e-commerce, and customer updates from e-commerce.

The system looks at the Company, Customer #, and Ownership ID fields in the Customer Ownership table to determine if the customer ownership information is a new record or an updated record.

- If the company, customer number, and ownership ID values match a record in the Customer Ownership table, the system updates the Active flag, Entry date, Confirm date, and Description fields for the existing customer ownership record.
- If the company, customer number, and ownership ID values do not match a record in the Customer Ownership table, the system creates a new customer ownership record for the sold to customer.

Note:

If the Active flag, Description, Entry date and Confirm date are passed blank, the system creates/updates the customer ownership record with a blank active flag, description, entry date, and confirm date.

If the remote entry does not include an ownership ID, the system does not create or update a customer ownership record and instead creates a customer note for the sold to customer: Missing Ownership ID: Ownership Description.

If an e-commerce catalog request includes errors, the system places the catalog request in the Catalog Request Interface table. You will need to correct the errors in the [Working with the Catalog Request Interface \(WCRU\)](#) menu option. If this happens, the system does not retain any customer ownership information that you defined for the sold to customer in the catalog request.

Work with Customer Ownership Screen

Use this screen to view and update the products a customer currently owns or previously owned.

Customer ownership records display in confirm date sequence with the most recent confirm date at the top of the screen.

This screen displays if customer ownership records currently exist for the sold to customer; if the sold to customer is not associated with any customer ownership records, the system automatically advances you to the [Create Customer Ownership Screen](#).

How to display this screen:

- Select Customer Ownership at the [More Customer Sold To Options Screen](#).
- Select Customer Ownership at the [Display More Options Screen](#).
- Select *Cust Ownership* at the [Create Catalog Request Screen](#).

Field	Description
Customer #	The number for the sold to customer that owns the customer ownership products. Numeric, 9 positions; display-only.
ID	Represents a product the customer owns or previously owned. Alphanumeric, 10 positions; display-only.
Description	A description of the product. Alphanumeric, 120 positions; display-only.
Act? (Active?)	Indicates if the customer currently owns the product. • <i>selected</i> = The customer currently owns the product. • <i>unselected</i> = The customer previously owned the product.
Entry date	The date the customer ownership record was created. Numeric, 6 positions (in user date format); display-only.
Confirm date	The most recent date when the customer confirmed ownership of the product. You can confirm a customer ownership record by selecting <i>Confirm</i> for a customer ownership record. The system also updates this field when you update the Active flag. Numeric, 6 positions (in user date format); display-only.

Screen Option	Procedure
Create a customer ownership record	Select <i>Create</i> to advance to the Create Customer Ownership Screen .
Delete a customer ownership record	Select <i>Delete</i> for a customer ownership record to delete it.
Confirm the customer ownership information with the customer	Select <i>Confirm</i> for a customer ownership record. The system updates the Confirm date field to the current date.

Screen Option	Procedure
Update the status of the customer ownership flag to active or inactive	Select <i>Active/Inactive</i> for a customer ownership record. - If the Active? flag was N, the system updates the flag to Y. - If the Active? flag was Y, the system updates the flag to N. The system updates the Confirm date field to the current date.

Create Customer Ownership Screen

Purpose: Use this screen to create a customer ownership record.

When you create a customer ownership record at this screen, the system defaults the current date to the Entry date and Confirm date fields.

How to display this screen: Select *Create* at the [Work with Customer Ownership Screen](#).

In addition, the system displays this screen if the sold to customer is currently not associated with any customer ownership records:

- Select Customer Ownership at the [More Customer Sold To Options Screen](#).
- Select Customer Ownership at the [Display More Options Screen](#).
- Select *Cust Ownership* at the [Create Catalog Request Screen](#).

Field	Description
Customer #	The number for the sold to customer that owns the product. Numeric, 9 positions; display-only.
Ownership ID	Represents a product the customer owns or previously owned. Alphanumeric, 10 positions; required.
Description	A description of the product. Alphanumeric, 120 positions; required.
Active flag	Indicates if the customer currently owns the product. <i>Selected</i> (default) = The customer currently owns the product. <i>Unselected</i> = The customer previously owned the product.

Working with Alternate Customer Number Cross-References

Purpose: Alternate customer number cross-references allow you to identify a customer record in Order Administration with the same customer's record in a different system.

How are alternate customer number cross-references created? The system creates an alternate customer number cross-reference when you:

- add or change the [Alternate customer number](#) in customer maintenance. If the customer already had an alternate customer number, the previous number is retained in the Alternate Customer Number Cross Reference table.
- create or update a customer through an integration with a remote system, such as through the *Generic Order Interface (Order API)* or *Generic Customer API*, if an alternate customer number is specified

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

- create a customer by any means, if the [Assign Alternate Customer # \(I88\)](#) system control value is *selected*
- add an alternate customer number cross-reference through the [Create Alternate Customer # Screen](#)

How many alternate customer number cross-references does a customer normally have? The system automatically creates an alternate customer number cross-reference each time you or the system create or change the Alternate customer number; however, the system does not automatically delete alternate customer number cross-references when you change the Alternate customer number.

Scanning by alternate customer number cross-reference: The [Display Alternate Customer Cross Reference Window \(I84\)](#) system control value determines how to use the Alternate Customer Number Cross Reference table for selecting customers at screens and through interfaces. See that system control value for a complete discussion of scanning by alternate customer number.

In this topic:

- [Work with Alternate Customer # Screen](#)
- [Create Alternate Customer # Screen](#)

Work with Alternate Customer # Screen

How to display this screen: Select [Work with Alternate Customer # Cross Reference](#) at the [More Customer Sold To Options Screen](#).

Field	Description
Customer #	A unique number to identify the customer. Numeric, 9 positions; display-only.
Customer name (unlabeled field to the right of the customer number)	The name or company name of the customer. Alphanumeric, 41 positions; display-only.
Alternate customer #	An alternate customer number cross-reference to identify the customer. Alternate Customer Number Label Description The field label name on this screen is based on the name you enter in the Alternate Customer Number Label Description (H95) system control value; if you do not enter a name in this system control value, the field label is Alt cust. Alphanumeric, 15 positions; optional.

Option	Procedure
Create a new alternate customer number cross reference	Select Create to advance to the Create Alternate Customer # Screen .

Option	Procedure
Delete an alternate customer number cross reference	Select <i>Delete</i> for an alternate customer number cross reference to delete it.

**Note:**

You cannot delete an alternate customer number cross reference if it matches the *Alternate customer number*. If the *Display Alternate Customer Cross Reference Window (I84)* system control value is *selected*, you cannot delete the *Alternate customer number*.

Create Alternate Customer # Screen

Purpose: Use this screen to create a new alternate customer number cross-reference to identify the customer for searching and scanning purposes.

How to display this screen: Select *Create* at the *Work with Alternate Customer # Screen*.

Completing this screen: Enter the cross-reference number to use when searching for a customer at scan screens or through interfaces. This is a 15-position, alphanumeric field.

Alternate customer number label: The field label name on this screen is based on the name you enter in the *Alternate Customer Number Label Description (H95)* system control value; if you do not enter a name in this system control value, the field label is Alt cust.

**Note:**

Creating an alternate customer number cross-reference at this screen does not automatically create a matching *Alternate customer number*.

Order Inquiry

In this part: Order inquiry spans the breadth of the system's functions, giving you access to customer, order, line, and item summary and detail information. This part presents the screens you use to review this information.

- *Using the Order Inquiry Scan Screens (OIOM)* shows you how to find an order based on the information available to you.
- *Reviewing the Order Inquiry Header Screen* presents the Order Inquiry screen, which contains information about the customer, such as name, address, phone number and source code.
- *Reviewing Order Inquiry Detail Information* presents the Order Inquiry screen containing information on the items the customer has ordered.

- [Reviewing Order Details](#) presents the screens you use to review detail related to a specific item on an order.
- [Options Available in Order Inquiry](#) presents a table of the functions available from the Order Inquiry Header or Detail screens, and refers you to topics containing more information on the use of these functions.
- [Reviewing Financial Information on an Order](#) presents screens that display information pertaining to charges and credits, such as invoices, refunds, and order totals. The topic also includes a discussion of order payment methods.
- [Reviewing Order-Level Properties](#) explains how to review order properties.
- [Display Order Line History Screen](#) explains how to review all activity performed on a particular item on an order.
- [Display Order History Screen](#) explains how to review all activity performed on an entire order.
- [Display Package Information Screen](#) describes the screen that lists all tracking numbers associated with shipments for the order and provides live links to shipment tracking pages when available.
- [Customer Engagement Purchase History Integration](#) presents the Display Purchase History screen, which contains a customer's completed sales and return transactions across multiple channels, such as retail, call center, and e-commerce. This purchase history information is from Oracle Retail Customer Engagement.

Reviewing the Order Inquiry Header Screen

Purpose: Depending on how the [Default Version for Order Inquiry \(C34\)](#) system control value is set, you advance to the [Order Inquiry Header Screen](#) or [Order Inquiry Detail Screen](#) when you select a quote or order to review.

In this topic: This topic describes the [Order Inquiry Header Screen](#).

Order Inquiry Header Screen

Purpose: This screen provides a snapshot of the sold-to and ship-to addresses on the quote or order, as well as totals. You cannot update any fields on this screen; instead, you must select *Maintain Order* to use Order Maintenance. See [Performing Order Maintenance](#) and [Maintaining Quotes in Order Maintenance](#).

Customer Workflow Management window: The [Customer Workflow Management Window](#) automatically displays when you first advance to the Order Inquiry Header screen if open or in use ticklers exist for the sold to customer on the order. Select *Ticklers* at this window to advance to the [Work with Ticklers Screen \(sold to customer view\)](#) where you can review and work with ticklers associated with the sold to customer.

How to display this screen:

- Select a quote or order at an order inquiry scan screen; [Using the Order Inquiry Scan Screens \(OIOM\)](#)
- Select *Sold To* at the [Order Inquiry Detail Screen](#)
- Select *Release* for a held order at a [Release Held Orders Screen \(Working with Releases\)](#)
- Select *Order Inquiry* at the [Work with Returns for Order Screen](#) in Work with Return Authorizations (streamlined version)
- Select *Ord Inq* for a refund at the [Work with Refunds Screen](#)

- Select *Order Inquiry* at the [Work with Order Broker Screen](#)
- Select an order for review at the [Pending Order Details Screen](#)

Originating order message: If the E-Commerce order number in the Order Header Extended table begins with the text `ORIG# :`, indicating the originating system for a retail pickup or delivery order is Order Administration, the message `This order is fulfilling another order: 9999-001` displays for the sourcing order, where 9999 is the originating order number in Order Administration, and 001 is the ship to number. See [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for more information.

Field	Description
Entity	The entity associated with the source code on the order header is in reverse video if the Display Entity Description (F84) system control value is <i>selected</i>. If this system control value is <i>unselected</i>, the entity does not display. A source code is associated with an entity through its division. Each division is associated with an entity. You might use entities to identify different catalogs or groups of catalogs within your company. See Working with Divisions (WDIV) for more information on setting up divisions and entities. Alphanumeric, 20 positions; display-only.
Multi-pay	This field appears when there is more than one pay type on the quote or order. When this field appears, you can check all pay types by pressing <i>F15</i>. See Display Order Payment Methods Screen for details. If there is only one pay type on the quote or order, the Pay type field appears instead. Alphanumeric, 9 positions; display-only.
Order	A unique number the system assigns to identify a quote or order. Numeric, 8 positions; display-only, assigned by the system.
Ship-to (Unlabeled field to the right of the order number)	A sequential, numeric value the system assigns to each shipping address on a quote or order. The ship-to number appears as a suffix to the quote or order number separated by a hyphen (-). Numeric, 3 positions; display-only, assigned by the system.
Number of shipments (Unlabeled field to the right of the ship-to number)	Indicates the number of shipments made to each ship-to address. A number appears in this field only if items on the order have been picked and billed; no number appears for express billed orders. This number appears as a suffix to the ship-to number separated by a hyphen (-). Numeric, 3 positions; display-only, assigned by the system.
Date	The date when the quote or order was created. Numeric, 6 positions (in user date format); display-only.
Payment plan type (Unlabeled field to the right of the Date field)	Informational text indicating whether a deferred or installment payment plan has been assigned to the quote or order. <i>DEFERRED</i> displays if the quote or order includes a deferred payment plan; <i>INSTALLMENT</i> displays if the quote or order includes an installment payment plan. Alphanumeric, 12 positions; display-only.

Field	Description
Status	Indicates the current state of a quote or order. The order status is open (i.e., active) unless the status field is set to one of the following values: • <i>Held</i> = An order is held when the system applies some type of hold on the order or the order entry operator places an order on hold by typing a user-defined hold reason code in the Hold reason field in Order Entry. The hold reason code and description appear beneath the status when the order is on hold. See the Hold rsn (Hold reason) field. • <i>Open</i> = An order that is not on hold, closed, canceled, or suspended. • <i>Closed</i> = An order is closed when all the items on the order are shipped or canceled. • <i>Cancelled</i> = An order is canceled when you have canceled each item individually or the entire order. • <i>Quote</i> = The order represents a pre-order quote that has not yet been converted to a standard order; see Entering Pre-Order Quotes. • <i>Suspended</i> = An order is suspended during Order Entry while it is being entered on the system. • <i>Express Bill</i> = The order has been submitted to the background job for billing, but processing is not yet complete. Display-only.
Type (Order type)	A code that identifies how the quote or order was received, such as over the telephone, through the mail (a mail order) by fax, etc. Order types are defined in and validated against the Order Type table. See Establishing Order Types (WOTY). Alphanumeric, 1 position; display-only.
Pay type	A code for the form of payment used on the quote or order. Pay types are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY). Numeric, 2 positions; display-only.
Hold rsn (Hold reason)	The reason the quote or order is on hold. Either the system or a user can place a quote or order on hold. You can create user hold reason codes; see Establishing Order Hold Reason Codes (WOHR). System holds include:

Field	Description
	Header level system holds • <i>AT</i> = Declined Credit Card Authorization • <i>AV</i> = Address Verification • <i>BD</i> = Balance Due • <i>BF</i> = Bill To Fraud • <i>BU</i> = Bill To Unconditional Hold • <i>DH</i> = Dollar Hold • <i>EB</i> = Bill-to Email Address • <i>EC</i> = Sold-to Customer Email Address • <i>EH</i> = E-Commerce Dollar Hold • <i>EO</i> = Order Email Address • <i>PT</i> = Pay Type • <i>SF</i> = Sold To Fraud • <i>SH</i> = Ship To Hold • <i>SM</i> = Ship To Mismatch • <i>SU</i> = Sold To Unconditional • <i>UB</i> = Unreferenced Bill To • <i>VD</i> = Pick Was Voided through Void All/Hold Order • <i>ZB</i> = Bill To Zip Fraud • <i>ZS</i> = Sold To Zip Code Fraud Ship to holds • <i>ES</i> = Ship-to Email Address • <i>HF</i> = Ship To Fraud • <i>HS</i> = Ship To/Sold To Fraud • <i>ZH</i> = Ship To Zip Fraud Pay type holds • <i>TM</i> = Time Hold • <i>KF</i> = Check Fraud • <i>CF</i> = Credit Card Fraud • <i>CW</i> = Waiting for Credit Card Authorization • <i>PV</i> = Pay Plan Velocity Hold • <i>P\$</i> = Pay Plan Dollar Threshold See Introducing Order Hold Reason Codes for a discussion of each system-assigned hold reason code. Display-only.
Ship via	The code for the shipper who delivers the merchandise to your customer. Ship via codes are defined in and validated against the Ship Via table. See Working with Ship Via Codes (WVIA). Numeric, 2 positions; display-only.
Sold to number	A unique number to identify the customer who placed the quote or order. Numeric, 9 positions; display-only.
Emails	Indicates whether there is any correspondence history related to the quote or order: • <i>selected</i> = There is correspondence history related to the quote or order • <i>unselected</i> = There is no correspondence history related to the quote or order; however, it is possible that there is correspondence history related to the customer You can review correspondence history for an order at the Work with Email by Order Number Screen. See Email Repository Overview for more information. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
Refunds	Indicates whether a refund record exists for this order, regardless of the refund status. If a refund record exists, you can view the refund record and refund status by pressing <i>F17</i>. See Display Refunds for Order Screen. Valid values are: • <i>selected</i> = Refunds exist for this order. • <i>unselected</i> = No refunds exist for this order.
Msgs (Messages)	Indicates whether there are order messages. You can view order messages by selecting <i>Order Messages</i>. See Work with Order Messages Screen. Valid values are: • <i>selected</i> = Messages exist for this quote or order. • <i>unselected</i> = No messages exist for this quote or order.
Recips (Recipients)	The total number of shipping addresses for the order. An order may have up to 999 recipients. A quote can have one recipient. If there is more than one recipient, you can display additional recipients by selecting <i>Recipients</i>. See Displaying Order Hold Information. Numeric, 3 positions; display-only.
Tickler	Indicates whether open or in use ticklers exist that are associated with the order or customer on the quote or order. You can view the ticklers by selecting the Ticklers option at the Displaying More Options in OIOM screen. • <i>selected</i> = Open ticklers exist for the order or customer on the quote or order. • <i>unselected</i> = Open ticklers do not exist for the order or customer on the quote or order. See Workflow Management Overview and Setup for an overview on workflow management processing.

Field	Description
Sold-to/ship-to	The name and address of the buyer (Sold To customer) and the recipient (Ship To Customer): Name The customer's name in last name, first name order. Company The name of the company. Note: A plus sign (+) appears next to the company name if the complete customer record includes additional address information in the third or fourth address lines. However, the plus sign does not display if there is additional address information in other fields, such as a third phone number.
	Street The customer's primary delivery address. Apt./Suite The apartment or suite number. Expanded address Additional lines containing additional address information, such as the post office box or special delivery information such as "Deliver to 7th floor" or "Contact customer before delivery." City The city in which the customer receives mail or shipments. St The state or province in which the customer receives mail or shipments. See Setting Up the Country Table (WCTY). Country The code for the customer's country. Country codes are defined in and validated against the Country table. See Setting Up the Country Table (WCTY).
Phone	The daytime and evening or third (mobile or fax) phone numbers and extensions for the sold-to and ship-to customers. The fields here are based on the following system control values: 1. The Phone Numbers (D15) system control value determines whether the third phone number (fax or mobile) or the evening phone number is listed after the day phone number. 2. If the <i>Phone Numbers (D15)</i> system control value is set to <i>DAY/FAX</i>, the Third Phone Number Type (L53) system control value determines whether the third phone number is labeled the Fax or Mobile number. See the <i>Phone Numbers (D15)</i> and <i>Third Phone Number Type (L53)</i> system control values for more information. Phone number format: You can define a telephone number format for each country to map to the phone numbers operators enter into the system. See Setting Up the Country Table (WCTY). One-time ship to customer: If you define a one-time ship to address for the order (see Assigning an Order Shipping Address), the phone number from the order ship to address defaults as the ship to day phone number. Alphanumeric, 14 positions; display-only.

Field	Description
Merch (Merchandise)	The total value of the items on the quote or order, excluding freight, additional charges, service charges, tax (but including hidden tax; see the Tax field), handling, and duty. The merchandise total does not include items that are canceled, soldout, or returned. Numeric, 20 positions with a 2-place decimal; display-only.
Freight	The total charge for shipping the quote or order, not including additional freight charges. You can define additional freight charges for a carrier to include standard freight; in this case, this field is blank. See the Add'l freight (Additional freight charges) field. This field also includes service charges by ship via, if any. This field also includes order weight charges based on the ship via defined for each ship to customer on the order. See Working with Ship Via Codes (WVIA). The system calculates freight charges based on the freight method defined for the source code. If the system calculates freight as a percentage of the merchandise charges, there might be a penny variation in total freight amount due to rounding differences. Numeric, 20 positions with a 2-place decimal; display-only.
Add'l freight (Additional freight charges)	The total dollar amount for freight charges, in addition to the base freight charge for the quote or order. Additional freight charges are set for the carrier, as defined in the Ship Via table. If the additional freight charges include the standard freight charges, the Freight field is blank. Examples of additional freight charges are overnight shipping, second day delivery, etc. The Add'l freight field in Order Inquiry corresponds to the Frt+ field in Order Entry. Numeric, 20 positions with a 2-place decimal; display-only.
Tax	The total sales tax for the quote or order, based on the value of the merchandise and, optionally, freight and special handling charges. If the order is subject to VAT, tax will generally be included in the item prices rather than in the Tax field; in this case, you can review the hidden tax for an item by Reviewing Order Details. Numeric, 20 positions with a 2-place decimal; display-only.
Handling (Handling charge)	The cost of any special handling on the quote or order, such as personalizing, monogramming, or engraving, and any gift wrapping charges. If there are any duty charges on the order, they are included in the Handling total. See Work with Duty Rates Screen. You can review the handling and detail charges for each item on the Display Order Detail Screen (Reviewing Order Line Detail). Numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
Add'l charges	This field can include charges or credits. Additional charges might include: Additional source code charge An additional charge for services that apply to the source code or offer. The system applies the additional charge to the quote or order based on the total dollar value of the merchandise. Credits A credit you apply to the customer's order, such as reimbursement for long distance telephone charges. Additional shipper/item charge An additional charge that applies to the item based on the shipper. Such charges may apply when the item exceeds established shipping rates, such as for oversized items. Dollar discounts A credit that is applied based on the total dollar value of the merchandise. You can define dollar discounts by source code or offer. If the Prorate Dollar Discounts and Coupons (D90) system control value is <i>selected</i>, the dollar discounts will be applied to the detail lines on the quote or order rather than appearing as a negative additional charge. The Add'l charges field in Order Inquiry corresponds to the Chg field in Order Entry. Numeric, 20 positions with a 2-place decimal; display-only.
Total (Order total)	The total amount the customer owes for the quote or order, including: • Merchandise • Freight • Additional freight charges • Taxes • Handling • Duty • Additional charges The total does not include charges for canceled, returned or sold out items. Numeric, 20 positions with a 2-place decimal; display-only.
Total cash paid	The amount of money the customer has paid you on the order to date with all prepaid and check pay types. Numeric, 20 positions with a 2-place decimal; display-only.
Balance open	The portion of the quote or order dollar total that you have not shipped to the customer or billed. Billing occurs after shipment confirmation. Numeric, 20 positions with a 2-place decimal; display-only.
Ref/balance due (Refund or balance due)	The customer's overpayment or underpayment on a single pay type order. <i>Overpayments</i> occur when the customer's payment exceeds the balance owed on the order. A positive number in this field reflects an overpayment (the amount you owe the customer). <i>Underpayments</i> occur when the customer's payment is less than the outstanding balance of the order. A negative number in this field reflects an underpayment (The amount the customer still owes to you). Numeric, 20 positions with a 2-place decimal.
Cash refunded	The total amount returned to the customer in the form of a refund check. Numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
Discount	The total discount applied to the order shipping address. The total discount is calculated by comparing the selling price with the item/SKU offer price. If you use a price override on any of the detail lines: • If the price override reason code's <i>Override item offer price</i> field is <i>selected</i>, the Ord discount includes any discounts that reduce the selling price from the price override amount you entered for the detail line. • If the price override reason code's <i>Override item offer price</i> field is <i>unselected</i>, and: • you override an existing item/SKU offer price for the item: the Ord discount includes the difference between the original item/SKU offer price and the final selling price, including the price override and any other discounts. When the system adds an item to the order at no charge (for example, an accompanying item) and the price override reason code defaults from the <i>Default Price Override Reason (B35)</i> system control value, then the regular offer price of the item is not included in the discount amount. • there is no item/SKU offer price for the item: the detail line does not affect the Ord discount total.

 Note:

The setting of the *Override item offer price* field has no effect on orders you receive through the e-commerce interface. If there is a price override reason code in the new order message, the system always processes these orders as if the field is *unselected*.

See *Overriding the Item/SKU Offer Price* for an overview of the *Override item offer price* field.

 Note:

This field is included only if the *Display Discount on Order Recap Screen (D38)* system control value is *selected*.

Any dollar discounts by source code or offer will appear as a negative additional charge if the *Prorate Dollar Discounts and Coupons (D90)* system control value is *selected*.

Numeric, 20 positions with a 2-place decimal; display-only.

Currency

The currency used on the order. Currency codes are defined in and validated against the Currency table. See *Working with Currency (WCUR)*.

 Note:

This field appears only if the *Multi Currency by Offer (E03)* system control value is *selected*.

Alphanumeric, 3 positions; display-only.

Reviewing Order Inquiry Detail Information

Purpose: Depending on how the [Default Version for Order Inquiry \(C34\)](#) system control value is set, you advance to the [Order Inquiry Header Screen](#) or [Order Inquiry Detail Screen](#) when you select a quote or order to review.

This topic assumes that you advance first to the *DETAIL* screen for Order Inquiry; however, you can also advance to this screen from the [Order Inquiry Header Screen](#) by selecting OK.

The Order Inquiry Detail screen gives you access to quote or order information at the item level. Use this screen when you need to review individual items, their reservation status, order messages, history, and other information on a specific item.

In this topic:

- [Order Inquiry Detail Screen](#)
- [Scan Order Detail Screen](#)
- [Display Order Broker Details Screen](#)

Not in this topic: This topic does not discuss the function keys displayed at the side of this screen. These options, common to both the Order Inquiry header and detail screens, are described in [Options Available in Order Inquiry](#).

Order Inquiry Detail Screen

Purpose: This screen highlights the items on the quote or order. You cannot modify any fields on this screen.

How to display this screen:

- Select a quote or order at an order inquiry scan screen; [Using the Order Inquiry Scan Screens \(OIOM\)](#)
- Select *Order Inquiry* for a held order at a [Release Held Orders Screen \(Working with Releases\)](#)
- Select *Order Inquiry* at the [Work with Returns for Order Screen](#) in Work with Return Authorizations (streamlined version)
- Select *Ord Inq* for a refund at the [Work with Refunds Screen](#)
- Select *Order Inquiry* at the [Work with Order Broker Screen](#)
- Select an order for review at the [Pending Order Details Screen](#)

Originating order message: If the E-Commerce order number in the Order Header Extended table begins with the text `ORIG#:`, indicating the originating system for a retail pickup or delivery order is Order Administration, the message `This order is fulfilling another order: 9999-001` displays for the sourcing order, where 9999 is the originating order number in Order Administration, and 001 is the ship to number. See [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for more information.

Additional fields: See [Reviewing the Order Inquiry Header Screen](#) for descriptions of the additional fields on this screen.

Field	Description
Whse (Warehouse)	The code for the warehouse this item shipped from, if the order entry operator selected a warehouse other than the one the system assigned; otherwise, the warehouse code is zero. You can review the actual warehouse code on the Display Order Detail Screen (Reviewing Order Line Detail); however, the warehouse code does not appear on this screen either until the order has been shipped. Numeric, 3 positions; display-only.
Ln #	A number the system assigns to each item as it is added to the order. The Order Inquiry detail screen displays lines in descending numeric sequence by line number so that the most recently entered item appears first. A quote or order can have up to 999 lines. • The code <i>RTN</i> appears below the line number if there has been a return against the order line. • The code <i>EXC</i> appears below the line number if there has been an exchange against the order line. The system identifies an order detail line as containing an exchange item if an associated Order Line History record contains an exchange reason code. You can review order line history on the Display Order Line History Screen. Numeric, 3 positions; display-only.
S (Status)	A one-position code indicating the current status of the item on the order. Possible statuses are: • <i>blank</i> = The order line is currently open. • <i>Express Bill</i> = You have entered the order using an express-bill ship via, but the BILL_ASYNC process has not yet processed the invoice. See Working with the BILL_ASYNC Job for background. • <i>Cancelled</i> = You have canceled the item using a cancel reason code that is not flagged to reduce demand. See Establishing Cancel Reason Codes (WCNR) for background on cancel reason codes. • <i>Error</i> = The order line is currently flagged with an error, and the order is suspended in an order batch. See Order Creation Errors for background. • <i>Held</i> = The order line is currently held. You can hold a line on an open order to prevent it from printing on a pick slip, even if it is available. • <i>Soldout</i> = The item has been sold out. An order line can be sold out: • manually in order entry or maintenance through the <i>Sell Out</i> option • automatically in order entry or maintenance, based on the soldout control code assigned to the item • through the Process Auto Soldouts option See Managing Soldouts and Backorders for background. • <i>Closed</i> = The item has been shipped, canceled with a cancel reason flagged to reduce demand, or partially shipped and the remainder of ordered quantity canceled. Display-only.

Field	Description
Item #	A code that identifies a unit of inventory. Item codes are defined in and validated against the Item table.
	 Note: An item alias is displayed if the customer ordered using an alias and the Display Item Alias (D56) system control value is <i>selected</i>.
SKU (Stock keeping unit)	Alphanumeric, 12 positions; display-only. An item's unique characteristics, such as its size and color. The first 14 positions of the SKU description defined at the Create SKU 1 of 2 (With Overrides) Screen are displayed in place of the SKU elements if the Display SKU Description in place of SKU Element (F25) system control value is <i>selected</i>.
H (Handling)	Alphanumeric, three 4-position fields; display-only. Represents the type of special handling for the item. Handling codes are defined in and validated against the Additional Charge Codes table. See Establishing Additional Charge Codes (WADC).
Ord (Ordered)	Alphanumeric, 2 positions; display-only. The number of units of an item the customer ordered.
Rsv (Reserved)	Numeric, 5 positions; display-only. The quantity of the item that the system has reserved from stock. The system does not reserve stock on quotes until they are converted to standard orders; see Converting Quotes to Orders. The reserved quantity is reduced when an item is canceled, confirmed for shipment, or unreserved using Interactive Reservation. The system updates this quantity at billing.
Shp (Ship)	Numeric, 5 positions; display-only. The number of units that have shipped. The system updates this quantity at billing. If an item has shipped, the shipping date displays below this number. Numeric, 5 positions; display-only.

Field	Description
Prt (Print)	The number of units included on a printed pick slip. <i>Pre-generated picks:</i> The system does not update this field when you create a pre-generated pick for the order line during pick slip preparation; the system updates this quantity when you generate a pick slip. See Applying Pick Slip Preparation to an Order and Performing Pick Slip Generation. <i>Voiding a pick slip:</i> The system reduces the printed quantity if you void the pick slip and don't reprint, or when shipment of the item is confirmed. <i>Order Orchestration?</i> For a brokered backorder or a store pickup order line that has been selected for fulfillment through integration with Order Orchestration, the print quantity is equal to the ordered quantity unless a shipment or pickup has already taken place, the order line has been canceled, or a partial quantity of the line is unfulfillable through Order Orchestration (brokered backorders only). See Brokered Backorders or Store Pickup Orders for an overview. Numeric, 5 positions; display-only.
Price	The unit price of the line. The item price is highlighted in a different color if the price represents a discount over the regular offer price for the item, and if the Display Order Line Discount Messages (F01) system control value is <i>selected</i>. However, the system does not highlight the price if the price was overridden on the detail line, and: • no item/SKU offer price exists, or • the price override reason code's Override item offer price is <i>selected</i>. See Overriding the Item/SKU Offer Price for more information on the effects of the Override item offer price field.

**Note:**

The setting of the [Override item offer price](#) field has no effect on orders you receive through the e-commerce interface. If there is a price override reason code in the new order message, the system always processes these orders as if the field is *unselected*.

Numeric, 13 positions with a 2-place decimal; display-only.

Field	Description
Brokered? (unlabeled field below the Ln#)	<i>Order Orchestration?</i> The line is flagged as: • <i>OBR</i> if the order line: – has been assigned to Order Orchestration for fulfillment (brokered backorder) – has been assigned to Order Administration for fulfillment by the Order – Broker (retail pickup or delivery) – ships to a store location, where the customer picks it up (ship-for-pickup) – a return or exchange has not been processed against the line; in this situation, <i>RTN</i> or <i>EXC</i> displays instead • <i>SPU</i> if the customer is picking up the order at a retail store location where the inventory is already available (store pickup) and a return or exchange has not been processed against the line (in this situation, <i>RTN</i> or <i>EXC</i> displays instead)

**Note:**

The *OBR* or *SPU* flag remains on the order line even if the line has been fulfilled, canceled, or rejected by the fulfilling store location.

- For a brokered backorder or a store pickup order line that has been selected for fulfillment through integration with Order Orchestration:
- the print quantity is equal to the ordered quantity unless a shipment or pickup has already taken place, or a partial quantity of the line is unfulfillable through Order Orchestration (brokered backorders only)
- if the order line has not yet been fulfilled, the Drop ship flag for the order line is set to *D*

Field	Description
	<i>Reviewing Order Orchestration details:</i> You can select <i>D/S Status</i> for the item to advance to the Display Order Broker Details Screen and review information about a brokered backorder line, or a line on a retail pickup, delivery, ship-for-pickup, or store pickup order. This option is available whenever there is a related Order Orchestration record in Order Administration, regardless of whether the line has been fulfilled or canceled, or rejected by the fulfilling store location.
	 Note: If the order line on a retail pickup, delivery, or ship-for-pickup order is also fulfilled through integration with Order Orchestration's Supplier Direct Fulfillment module, and the drop ship information has already been sent to Order Orchestration, you advance first to the Display P/O Drop Ship Screen. From that screen, you have the option to advance to the Display Order Broker Details Screen.
	See Order Orchestration Integration for background.
	Alphanumeric, 3 positions; display-only.
Item description (unlabeled field below the item code)	The description of the item.
	Alphanumeric, 120 positions; display-only.
Expected ship date	<i>Backordered item:</i> the date a purchase order for this backordered item is expected.
	 Note: This field is not displayed for a reserved item, or if there are no open purchase orders for the item.
	<i>Drop ship item, including brokered item:</i> This date is displayed for drop ship items if the Assign Drop Ship Expected Ship Date (I59) system control value is <i>selected</i>. See that system control value for more information.
	Numeric, 6 positions (in user date format); display-only.
Invoice date	The most recent date when you billed for shipment on this order detail line. This field is blank for order detail lines that have not yet shipped.
	Numeric, 6 positions (in user date format); display-only.
Extended price	The extended price of the line, calculated as: $\text{Unit price} \times \text{Order quantity} = \text{Extended price}$
	Numeric, 20 positions with a 2-place decimal; display-only.

See [Options Available in Order Inquiry](#) for a listing of all functions and options available.

Screen Option	Procedure
Review line details	Select <i>Display</i> for an item to advance to the Display Order Detail Screen (Reviewing Order Line Detail) .
Review a page or document associated with an order detail line	Select <i>Attached Link</i> for an item to advance to the Display Hyperlink Screen. This screen is available only if a link for the order detail line was passed in the <i>Inbound Order XML Message (CWORDERIN)</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Review coupon discounts	Select <i>Coupons</i> for an item to advance to the Coupon Discount Window . You cannot change any information on this screen.
View Order Orchestration drop ship status information about a purchase order detail line	Select <i>D/S Status</i> for an item to advance to the Display P/O Drop Ship Screen, if: - the item is a drop ship item, and - you use the Order Orchestration interface to process drop ship items for this vendor (see Drop ship output), and - you have already sent the drop ship purchase order to Order Orchestration's Supplier Direct Fulfillment module Both drop ship and fulfilled through Order Orchestration? If this is a delivery, retail pickup, or ship-for-pickup order and the item is fulfilled through drop ship integration with Order Orchestration as described above, you advance first to the Display P/O Drop Ship Screen, with an option to advance to the Display Order Broker Details Screen.
Review the Order Orchestration information for any order line being fulfilled through the integration with the Order Orchestration Integration	Select <i>D/S Status</i> for an item to advance to the Display Order Broker Details Screen, if: - the item has been submitted to Order Orchestration for fulfillment (brokered backorder), or - the customer picks up the order up at a retail location where the inventory is available (store pickup), or - the order was assigned to Order Administration for fulfillment (retail pickup or delivery), or - the order ships to a store location, where the customer picks it up (ship-for-pickup), and a pick slip or drop ship pick slip or purchase order has already been generated for the order line See Order Orchestration Integration. Both fulfilled through Order Orchestration and drop ship? If this is a delivery, retail pickup, or ship-for-pickup order and the item is fulfilled through integration with Order Orchestration's Supplier Direct Fulfillment module, you advance first to the Display P/O Drop Ship Screen, with an option to advance to the Display Order Broker Details Screen.

Screen Option	Procedure
Review stored value cards	Select <i>SVC</i> for an item to advance to the Display Stored Value Cards Screen if the item is a stored value card item (SVC type is <i>P</i> , <i>E</i> , or <i>V</i>). An error message indicates if the item on the order line is not a stored value card or the stored value card has not yet been billed: SVC do not exist for this item/SKU.
Review history	Select <i>History</i> for an item to advance to the Display Order Line History Screen .
Review order line messages	Select <i>Messages</i> for an item to advance to the Work with Order Line Messages Screen .
Review reserved lines	Select <i>Reserved lines</i> for an item to advance to the Display Reserved Order Lines Screen .
Review special handling	Select <i>Special Handling</i> for an item to advance to the Display Special Handling Screen or the Display Custom Special Handling Screen .
Review zone reservation dates	Select <i>Zone Resv</i> for an item to view the Display Zone Reservation Dates Window .

Scan Order Detail Screen

Purpose: Use this screen to review detail information in a simple tabular format. This format allows more items to display on the screen at one time, and can make it easier for you to scan certain types of information quickly.

How to display this screen: Select *Scan Lines* at the [Order Inquiry Detail Screen](#). Also, if the [Default Version for Order Inquiry \(C34\)](#) system control value is blank, you advance to this screen when you:

- Select a quote or order at an order inquiry scan screen; [Using the Order Inquiry Scan Screens \(OIOM\)](#)
- Select *Sold To* at the [Order Inquiry Detail Screen](#)
- Select *Release* for a held order at a [Release Held Orders Screen \(Working with Releases\)](#)
- Select *Order Inquiry* at the [Work with Returns for Order Screen](#) in Work with Return Authorizations (streamlined version)
- Select *Ord Inq* for a refund at the [Work with Refunds Screen](#)
- Select *Order Inquiry* at the [Work with Order Broker Screen](#)
- Select an order for review at the [Pending Order Details Screen](#)

Field descriptions: See [Order Inquiry Detail Screen](#) and [Reviewing the Order Inquiry Header Screen](#) for each field not described.

Field	Description
Inv dt (Invoice date)	The date when the item was billed. Numeric, 6 positions (in user date format); display-only.
Rtn (Returned quantity)	The quantity of the item that has been returned. Numeric, 5 positions; display-only.

Available options: Select *Detail* at this screen to display the [Order Inquiry Detail Screen](#). See [Options Available in Order Inquiry](#) for information on the remaining function keys.

Display Order Broker Details Screen

Purpose: Use this screen to review the details of an order line that:

- was backordered and submitted to Order Orchestration for fulfillment (*brokered backorder*), even if the line was not fulfilled through Order Orchestration and has returned to standard warehouse processing or has shipped, or is on an order that:
 - originated in Order Administration, and the customer picks up at a store location where the merchandise is already available (*store pickup order*), or
 - originated in Order Administration, and ships to a store location where the customer picks it up (*ship-for-pickup order*), or
 - Order Orchestration sent to Order Administration for shipment directly to the customer (*delivery order*), or
 - Order Orchestration sent to Order Administration for shipment to the originating store location, where the customer picks it up (*retail pickup order*)

Each field on this screen is display-only.



Note:

This screen does not display activity related to changing the setting of the order's Under Review flag in Order Orchestration based on the order's hold status in Order Administration, although the [Display Order History Screen](#) does display a related message. This activity can occur if the [Send Held Orders to OROB \(M18\)](#) system control value is selected; see that system control value for a discussion.

For more information: See the [Order Orchestration Integration](#) for background on different types of orders fulfilled through integration with Order Orchestration's Order Orchestration module.

How to display this screen: Select *D/S Status* for an order line at the [Order Inquiry Detail Screen](#). This option is available only for items fulfilled through integration with Order Orchestration (flagged on the [Order Inquiry Detail Screen](#) as *OBR* or *SPU*).

If the order line is fulfilled through integration with Order Orchestration's Supplier Direct Fulfillment module: You advance first to the [Display P/O Drop Ship Screen](#), with an option to advance to the Display Order Broker Details screen, if:

- this is a delivery, retail pickup, or ship-for-pickup order, and
- the item is fulfilled through integration with Order Orchestration's Supplier Direct Fulfillment module, and
- Order Administration has already sent the purchase order information to Order Orchestration

To display this screen from the [Display P/O Drop Ship Screen](#), select *Order Broker Detail*.

**Note:**

If you advance to this screen by selecting *Order Broker Detail* at the Display P/O Drop Ship screen, you return to the Display P/O Drop Ship screen when you exit this screen.

Field	Description
Order #	A unique number the system assigns to identify the order. The ship-to number is to the right, separated by a hyphen. Order number: numeric, 8 positions. Ship-to number: numeric, 3 positions.
Line #	A number the system assigns to each item as it is added to the order. Numeric, 3 positions.
Broker delivery type	Indicates the type of order: • blank = brokered backorder. See Brokered Backorders for background. • DELIVERY: See Retail Pickup (including Ship-for-Pickup) or Delivery Orders for background. • RETAIL PICKUP: See Retail Pickup (including Ship-for-Pickup) or Delivery Orders for background. • SHIP FOR PICKUP: See Ship-for-Pickup Orders for background. • STORE PICKUP: See Store Pickup Orders for background.
Originating Location	The location originally assigned to fulfill the order. From the cross-reference record set up through Work with Store Cross Reference (WSCR). The description of the location is separated from the location code by a hyphen (-). See the Order Orchestration Originating Location, Fulfilling Location, and Pickup Location for a discussion, including information on when the location field is blank. The location description is truncated if it exceeds the allotted space. Location code: alphanumeric, 10 positions. Location description: alphanumeric, 40 positions.
Pickup Location	The location where the customer has selected to pick up the order. From the cross-reference record set up through Work with Store Cross Reference (WSCR). The description of the location is separated from the location code by a hyphen (-). See the Order Orchestration Originating Location, Fulfilling Location, and Pickup Location for a discussion, including information on when the location field is blank. The location description is truncated if it exceeds the allotted space. Location code: alphanumeric, 10 positions. Location description: alphanumeric, 40 positions.

Field	Description
Item/SKU	A code that identifies a unit of inventory. Item codes are defined in and validated against the Item table.

**Note:**

The regular item code is displayed, regardless of whether the customer ordered using an alias and the [Display Item Alias \(D56\)](#) system control value is *selected*.

Order qty Alphanumeric, 12 positions.
The number of units of the item that the customer ordered.
Numeric, 5 positions.

Details tab**Multiple locations?**

- If you use the split order and split line options and Order Orchestration cannot find a single location to fulfill a brokered backorder line, it might split the across multiple fulfilling locations; splitting can occur either when Order Orchestration initially receives the order, or if the first assigned location rejects the line and Order Orchestration “reshops” it. The [Use Split Order \(L56\)](#) system control value controls this option in Order Administration, while the Allow Split Order and Allow Split Line settings at Order Orchestration’s **Preferences** screen control these options in Order Orchestration. In this situation, there is a single request ID assigned by Order Orchestration.
- If the [Create Separate Picks for Ship for Pickup Orders \(L89\)](#) system control value is selected and a line on a ship-for-pickup order splits across multiple warehouses for shipment, Order Administration creates a separate SubmitOrder request to Order Orchestration for each warehouse. In this situation, each SubmitOrder request creates a separate request ID assigned by Order Orchestration.

**Note:**

It is not possible to have a split line on other types of Order Orchestration orders.

Field	Description
Fulfilling Location	The location where: - the item is currently assigned for fulfillment, which might be a store location (brokered backorder) or the Order Administration warehouse (retail pickup or delivery order) - the customer picks up the order (store pickup or ship-for-pickup order) From the cross-reference record set up through Work with Store Cross Reference (WSCR). The description of the location is separated from the location code by a hyphen (-). See the Order Orchestration Originating Location, Fulfilling Location, and Pickup Location for a discussion, including information on when the location field is blank. The location description is truncated if it exceeds the allotted space. Location code: alphanumeric, 10 positions. Location description: alphanumeric, 40 positions.
Status	The current status of the Order Orchestration request. Possible statuses are described at the Order Orchestration Status Summary Table.
Qty	The quantity currently assigned to the fulfilling location. Might be less than the ordered quantity if this is a brokered backorder, the Use Split Order (L56) system control value is selected, and the Allow Split Order and Allow Split Line preferences in Order Orchestration are also selected. Numeric, 5 positions.
Created date/time	The date and time when the Order Orchestration request was created. Date: Numeric, 6 positions (in user date format). Time: Numeric, 6 positions (HH:MM:SS format).
Polled date/time	The most recent date and time when the BROKER job evaluated whether to request a status update for the order line. The job uses the Order Broker Status Update Interval (K10) system control value to determine how often to check on status. Not used for retail pickup or delivery orders, which do not originate in Order Administration. Date: Numeric, 6 positions (in user date format). Time: Numeric, 6 positions (HH:MM:SS format).

Field	Description
Request ID	A unique ID number assigned by Order Orchestration to identify the order line or order: - If you do not split orders, each individual brokered backorder item submitted to Order Orchestration receives a unique request ID, and Order Orchestration treats it as a separate order; otherwise, lines on an order create a single request ID in Order Orchestration when the system submits the lines to Order Orchestration in the same request message. - If the Create Separate Picks for Ship for Pickup Orders (L89) system control value is selected, Order Administration submits each order line to Order Orchestration as a separate order, and Order Orchestration assigns each its own request ID. - Store pickup orders cannot be split. The request ID is blank for requests whose status is: <i>Z: Canceled</i> <i>C: Closed</i> <i>J: Rejected</i> <i>R: Ready</i> <i>W: Waiting</i> The field might also be blank for requests in <i>E: Error</i> status, depending on the nature of the error. For example, requests that Order Orchestration did not receive and create successfully are not assigned request ID's. Although the field in Order Administration is up to 25 positions, Order Orchestration does not support a request ID longer than 10 positions. Numeric, 25 positions.
History tab	History records sort by the line number assigned in Order Orchestration, and then by date and time within line number. The most recent 101 history records are displayed.
Date	The date when the request was sent to Order Orchestration, or when the response was received in Order Administration. Numeric, 6 positions (in user date format).
Time	The time when the request was sent to Order Orchestration, or when the response was received in Order Administration. Numeric, 6 positions (HH:MM:SS format).
OROB Ln#	The line number currently assigned in Order Orchestration at the time the response was sent or received. The line number is blank for history that occurs before Order Orchestration sends a response message indicating the current line number. If the order line is initially split at creation in Order Orchestration, the first few history records might have blank line numbers. Numeric, 5 positions.

Field	Description
Transaction type	The type of activity that occurred. Possible transaction types are: <i>C - Send Status Request</i> = Order Administration sent an request to Order Orchestration to inquire about the order's current status. <i>D - Receive Status Response</i> = Order Administration received the status inquiry response message from Order Orchestration. Note: Once the order line is in Accepted status, Order Administration does not write a history record for the status inquiry response as long as the record remains in this status. <i>M - Maintenance Transaction</i> = You canceled the brokered backorder or store pickup request. You can cancel a brokered backorder either through order maintenance, or by canceling the Order Orchestration request itself (but not the order line) at the Work with Order Broker Screen; however, you can only cancel a store pickup request through order maintenance. <i>E - Send Update Request</i> = Order Administration sent a status update request message to Order Orchestration. <i>F - Receive Update Response</i> = Order Administration received the status update response message from Order Orchestration. See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) for examples of the different messages generated or received by Order Administration as part of the Order Orchestration integration. Alphanumeric, 25 positions.
Status	The status of the Order Orchestration line at the time of the activity. Possible statuses are described at the Order Orchestration Status Summary Table.
Fulfilling Location	The location where the item was assigned for fulfillment (brokered backorder, retail pickup, or delivery) or pickup (store pickup, ship-for-pickup) at the time the activity occurred. The description of the location is separated from the location code by a hyphen (-). If there is no Store Cross Reference record for the location, no description is displayed. See the Order Orchestration Originating Location, Fulfilling Location, and Pickup Location for a discussion. The location description is truncated if it exceeds the allotted space. Location code: alphanumeric, 10 positions. Location description: alphanumeric, 40 positions.
Qty	The quantity of the Order Orchestration line at the time of the activity. Might be less than the ordered quantity if this is a brokered backorder, the Use Split Order (L56) system control value is selected, and the Allow Split Order and Allow Split Line preferences in Order Orchestration are also selected. Numeric, 5 positions.

Field	Description
Error	The error, if any, received from Order Orchestration. The error message is truncated if it exceeds 30 positions. An error of Null response from OROB indicates that the OROB Account (K49) system control value is not set correctly. See Troubleshooting the Order Orchestration Integration and the <i>Order Orchestration Web Services Guide</i> https://support.oracle.com (ID 2953017.1) for more information on possible errors. Alphanumeric, 30 positions; display-only.

Reviewing Order Details

Purpose: From the [Order Inquiry Detail Screen](#) you can display information about a specific item purchased on a quote or order. Order line detail provides you with information you may need to respond to a customer's inquiry.

In this topic: This topic presents the screens and pop-up windows available from the [Order Inquiry Detail Screen](#) and the [Display Order Detail Screen \(Reviewing Order Line Detail\)](#):

- [Display Order Detail Screen \(Reviewing Order Line Detail\)](#)
- [Display Hyperlink Screen](#)
- [Display Special Handling Screen](#)
- [Display Custom Special Handling Screen](#)
- [Display Reserved Order Lines Screen](#)
- [Display Zone Reservation Dates Window](#)
- [Item Availability Screen](#)
- [Order Pricing Window](#)
- [Order Quantities Window](#)
- [Order Dates Window](#)
- [Work with Item/SKU Comments Window](#)
- [Display P/O Drop Ship Screen](#)
 - [Submit Cancel Request Pop-up Window](#)

For more information:

- item history (*History*): [Display Order Line History Screen](#)
- zone reservation process (*Zone Res*): [Shipping Zone Reservation Overview](#)

Display Order Detail Screen (Reviewing Order Line Detail)

Purpose: Use this screen to review information related to a specific item on the quote or order. The information at the top of this screen identifies both order and line information.

How to display this screen: At the [Order Inquiry Detail Screen](#) or at the [Scan Order Detail Screen](#), select *Details* for an item.

Field descriptions: See [Order Inquiry Detail Screen](#) and [Order Inquiry Header Screen](#) for each field on this screen not described.

Field	Description
B/O (Back order)	A brief explanation of the reason an item is on backorder or unavailable for shipment. Order Orchestration? If the detail line has been assigned to Order Orchestration for fulfillment, the detail line is flagged as backordered and has a Printed quantity that is equal to the ordered quantity. In this case, the Drop ship flag for the order line is set to <i>D</i>. The backorder reason remains on the order line even after the line is fulfilled through Order Orchestration. See Brokered Backorders for an overview. Alphanumeric, 25 positions; display-only.
Ofr (Offer)	A code for the catalog, space or television advertisement from which you accept quotes and orders. The offer defined for the quote or order controls how to calculate shipping and price items. However, if you override the offer for an item (if the customer is ordering from more than one catalog, for example), demand for the item is attributed to the offer associated with the item rather than the order. Demand represents the number and dollar value of orders placed against an offer.
	 Note: The system automatically overrides the offer for an item if Override Offer on Order Detail Line (D49) system control value is <i>selected</i> and the item is not sold in the offer used on the order.
Price	Offers are defined in and validated against the Offer table. See Working with Offers (WOFR). Alphanumeric, 3 positions; display-only. The per unit price of this item, after applying all discounts and repricing. This price reflects any coupon discount amount or dollar discount by offer or source if the Prorate Dollar Discounts and Coupons (D90) system control value is <i>selected</i>. Numeric, 13 positions with a 2-place decimal; display-only.
Pricing method (Unlabeled field directly below the Price field)	The method the system used to calculate the price of an item, such as special source pricing, quantity break by item (item/offer pricing), or price codes. See the Order Pricing Window for a listing of pricing methods. Alphanumeric, 25 positions; display-only.
N/C (No charge)	This flag indicates whether the customer will be charged for the item. Valid values: <i>No Charge</i> = The customer is not charged for the item. <i>Priced</i> = The customer is charged for the item.

Field	Description
Ovr (Price override reason code)	Represents the reason that the price of an item was changed or the customer was given the item at no charge. The system assigns a price override reason code when a free gift or promotional item is added to the order. For quotes, the system assigns the price override reason code defined in the Price Override Reason for Quotes (K75) system control value to each detail line. Price override reason codes are defined in and validated against the Price Override Reason Code table. See Establishing Additional Charge Codes (WADC). Several system control values are available for the system to assign a price override reason code for different types of price overrides; see Setting Up Order Entry Values. Numeric, 1 position; display-only.
Offer price	The item price as defined for the offer. If the order was subject to VAT and tax-inclusive pricing, in which any tax is included in the Hidden tax field rather than the Tax bucket on the order, the offer price presented here is the tax-inclusive offer price.
	 Note: When a price override reason applies to the order line (whether you enter an override reason manually, or if the system applies the override automatically), the override reason's Override item offer price setting controls whether to use the regular offer price. See Overriding the Item/SKU Offer Price for a discussion.
	Customer price group pricing: If you use Customer Price Group Pricing, the offer price represents the initial price of the item, based on the Price Type defined for the customer price group. Numeric, 13 positions with a 2-place decimal; display-only.
Pre-disc price (Pre-discount price)	The item price before applying any coupons or dollar discounts by source or offer, if the Prorate Dollar Discounts and Coupons (D90) system control value is <i>selected</i>, but after applying other discounts and repricing. The system does not update this field if you change the customer's tax status at any point after entering the item. If you use tax-inclusive pricing, there may be cases where the system reprices items due to changes in a customer's tax exemption status, changing the shipping address to a VAT-exempt state, etc. In these cases, the pre-discount price may not correspond to the way the actual price was derived. Numeric, 13 positions with a 2-place decimal; display-only.
Duty	The amount of duty, if any, charged for the item. The system calculates duty based on the duty rates defined for the country of the ship-to address and the harmonize code defined for the item. See Setting Up the Country Table (WCTY). Duty is included in the Handling bucket for the order. Numeric, 13 positions with a 2-place decimal; display-only.

Field	Description
Ship via	A code that identifies the carrier who delivers the merchandise. Ship via codes are defined in and validated against the Ship Via table. See Working with Ship Via Codes (WVIA). A ship via code appears here only if the ship via for the item is different from the ship via on the quote or order. Numeric, 2 positions; display-only.
Extension	The total dollar amount for the item. Calculation is: <code>Order Quantity x Item Price = Extension</code> The extension is based on the item selling price, after applying all discounts and repricing. Numeric, 20 positions with a 2-place decimal; display-only.
Discount method (Unlabeled field below the duty field)	The method, such as source code discount or order discount, that the system used to apply any discounting to the item price after applying any other pricing methods (but before applying a coupon amount or dollar discount by source or offer, if the Prorate Dollar Discounts and Coupons (D90) system control value is <i>selected</i>). Alphanumeric, 25 positions; display-only.
Arr date (Arrival date)	The date the customer requested delivery of the item. The order date defaults in order entry. Numeric, 6 positions (in user date format); display-only.
Source	The source code assigned to the detail line. A source code appears here only if: - the Order Entry operator entered a source code at the line level, or - the Use Source Code from Order Header When Creating Order Lines (D73) system control value is <i>selected</i>, or - the Load Source from Mailing History (D20) system control value is <i>selected</i> and the offer entered on the detail line is not associated with the source code on the order header, and the system found an associated source code in the customer's mail history. The source code at the line level controls demand and sales information/posting for that item, whereas the source code on the order controls how items are priced and freight is calculated. Alphanumeric, 9 positions; display-only.
Exp ship date (Expected ship date)	<i>For a backordered item:</i> the date a purchase order containing this backordered item is expected. <i>For drop ship items, including brokered items:</i> This date is displayed for drop ship items only if the Assign Drop Ship Expected Ship Date (I59) system control value is <i>selected</i>. See that system control value for more information. Numeric, 6 positions (in user date format); display-only.
C/G (Coordinate group)	A number assigned to two or more items to ensure that they ship together. Numeric, 2 positions; display-only.
Freight	The charge for shipping the item. This total does not include additional freight charges, and is blank if the freight is calculated for the entire order instead of item-by-item. The system calculates freight charges based on the freight method defined for the source code on the order. Numeric, 13 positions with a 2-place decimal; display-only.

Field	Description
B/O whs (Backorder warehouse)	A code that identifies the warehouse assigned to ship a backordered item.
	 Note: This field appears only if there is a backordered quantity of the item, or if the order line has been assigned to Order Orchestration for fulfillment as a brokered backorder. If the line is fulfilled through Order Orchestration as a brokered backorder, the backorder warehouse remains on the order line. See Brokered Backorders for an overview.
G/W (Gift wrap)	Numeric, 3 positions; display-only. A flag that identifies whether the item is gift wrapped. Valid values are: <i>Selected</i> = Gift wrap the item. <i>Unselected</i> = Do not gift wrap the item.
S/H code (Special handling code)	Represents the type of special handling to be performed on the item. Special handling refers to any type of item personalization, such as monogramming, alterations, engraving, etc. The item/SKU offer controls whether you can apply special handling to an item/SKU. See Special Handling Overview for more information. Alphanumeric, 2 positions; display-only.
S/H charge (Special handling charge)	The dollar amount for special handling of the item. See Special Handling Overview for more information. Numeric, 13 positions with a 2-place decimal; display-only.
Future order	This flag indicates that the arrival date for the item is too far in the future to reserve stock. The item is reserved when the current date reaches the requested arrival date minus lead days for picking and shipping. Valid values are: <i>Selected</i> = This is a future order; do not reserve inventory. <i>Unselected</i> = This is not a future order and is eligible for inventory reservation.
Warehouse	The warehouse shipping the item. Typically set to 0. Some reasons why an order line might be assigned to a specific warehouse: - this is a retail pickup or delivery order assigned to a warehouse by Order Orchestration - the order line is a return created by entering a negative quantity in order entry - the order line was express-billed - you specified a warehouse override for the order or line when creating the order, either in interactive order entry or through the order API Numeric, 3 positions; display-only.

Field	Description
Cancel date	The last date when the customer will accept receipt of this item. For quotes, this is the date the quote expires. Items that have not shipped by the cancel date are included in the Order Cancellation List by Item; however, they are not canceled automatically. This gives you the opportunity to contact the customer and extend the delivery time. Numeric, 6 positions (in user date format); display-only.
Affect inv (Affect inventory)	If this flag is selected, it indicates that the system reserves the item and reduces inventory after a shipment. Valid conditions are: • <i>Selected</i> = Reserve the item and reduce inventory. • <i>Unselected</i> = Do not affect inventory. This flag is unselected if the item is flagged as a non-inventory item.
Drop ship	A code that identifies the item as one that you do not typically stock in inventory, and which you must order from your vendor, who then ships the item(s) directly to the customer. An item is defined as a drop ship item in the Item table, or can be identified as a drop ship item in order entry or maintenance. Valid values are: • <i>D</i> = Drop ship item. • blank = Regular item. Order Orchestration? If the order line has been assigned to Order Orchestration for fulfillment (brokered backorder) or if the customer is picking up the order at a store location where the inventory is already available (store pickup), the Drop ship flag for the order line is set to <i>D</i>. In this case, the order line is flagged as B/O and it has a Printed quantity that is equal to the ordered quantity. See Brokered Backorders or Store Pickup Orders for an overview. Alphanumeric, 1 position; display-only.
Priority	A number that controls the priority of order fulfillment on a backordered item. Priority codes range from 0-9, where: • 0 = lowest priority • 9 = highest priority A value defaults to this field if a priority was entered or defaulted into the Pty (Priority) on the order header; and this field, in turn, defaults from the B/O priority (Backorder priority) field for the source code. Numeric, 1 position; display-only.

Field	Description
Bypass rsv (Bypass reservation)	This flag controls whether the system reserves this item during Order Entry. - If the Use OROB for Fulfillment Assignment (M31) system control value is selected, the system selects this flag for each order line sent to Order Orchestration for fulfillment assignment. See Brokered Backorders. - If the Use OROB for Fulfillment Assignment (M31) system control value is unselected, items that bypass immediate reservation must be reserved using Interactive Reservation. See Working with Interactive Reservation (MIRV). You can define an item to bypass reservation in the Item table. Valid values are: <i>Selected</i> = Bypass immediate reservation. <i>Unselected</i> = Do not bypass immediate reservation. Regardless of the setting of this field, the system does not reserve items on quotes.
Page letter	Indicates the item was ordered by page/letter rather than item number. The page letter code consists of the page of the catalog where the item appears and its position on the page. Page/letter entry format is possible only if you have selected this format for Order Entry. The page/letter assignment is defined in the Item/Offer table. See Performing Initial Item Entry (MITM). <i>Example:</i> Item C100 appears on page 52 of the winter preview catalog. It is the first item on the page. If using page/letter entry, you can select it as item W52A in Order Entry; however, the item appears as C100 on the order and prints as C100 on the pick slip. Alphanumeric, 6 positions; display-only.
Cost override	The override to the item's cost, from order entry or order maintenance. You can override the cost of an item to manage the gross profit margin calculation. Gross profit margin is that amount of the price that exceeds your cost for the item. A common application of cost override in order entry is when you receive cost information from a drop ship vendor, and you calculate a gross profit margin based on the vendor's statement of cost; the new cost information appears in this field. Numeric, 13 positions with a 4-place decimal; display-only.
G/W \$ (Gift wrap price)	The dollar amount charged for gift wrapping an item, as defined in the Item/Offer or SKU/Offer record. Numeric, 13 positions with a 2-place decimal; display-only.
Add'l frt (Additional freight)	The dollar amount of shipper/item charges, as defined for the shipper and item at the Work with Ship Via/Item Screen. Numeric, 13 positions with a 2-place decimal; display-only.
Tax	Sales tax charged for the item, as calculated by the system. This is the extended tax amount; that is, the total tax for the entire quantity. The total in the Tax bucket on the order may not equal the totals for each item if, for example the order is subject to tax on handling and/or freight, or due to rounding up or down to the nearest penny. On orders subject to VAT and tax-inclusive pricing, any tax appears in the Hidden tax field. This amount is not included in the Tax bucket on the order totals. Numeric, 13 positions with a 5-place decimal; display-only.

Field	Description
Tax override %	The tax rate for the tax.

**Note:**

This field displays only if a Tax override rate is defined in the Order Detail table.

The system uses the following calculation to determine the tax override rate:

$$(\text{tax amount} / \text{extended amount}) \times 100 = \text{tax override rate}$$

The system stores the tax rate for the tax override in the ODT Tax Override Rate field in the Order Detail table; the system uses the tax rate during Order Maintenance if you use the Discount Price window to apply a discount to a shipped item. Billing also uses this tax rate to create the credit invoice and calculate the tax credit amount using the new tax amount. See [Discount Price Window \(Applying a Discount to an Item\)](#) for an example.

Numeric, 7 positions with a 5-place decimal; display-only.

Hidden tax

The amount of any hidden tax attributed to the item. This field appears only if the [Tax Included in Price \(E70\)](#) system control value is *selected*, and a hidden tax amount appears only for orders and items subject to VAT and tax-inclusive pricing.

On orders using tax-inclusive pricing, you charge a different, higher price for an item than an orders subject to conventional tax. Also, any tax amount is not calculated in the standard way and included in the Tax bucket on the order; instead, a hidden tax amount is calculated based on the information you have defined for the customer's country or the item itself, and this amount is "hidden" on the order detail line; this tax is not visible to the customer. Unlike the item tax included in the Tax field, described above, the hidden tax is a unit amount, not an extended amount; you must multiply the hidden tax amount by the item quantity to arrive at the extended hidden tax amount for the order line.

In tracking sales figures, such as in the Order Billing History table and on marketing reports, the system subtracts the hidden tax amount from the item price to determine sales dollars. For example, if the customer pays \$10.00 for an item, but the hidden tax amount is \$1.50, the system posts the sale as \$8.50.

It is possible for the hidden tax for an item to exceed the price you charge the customer if you have defined hidden tax for the item as an amount rather than a percentage of the item price, and you sell the item at a considerable discount or as a free gift.

An item may be exempt from tax, hidden tax, or both based on exemptions defined for the order, customer, state, or item. See [Working with Customer Tax Status](#) for more information on tax exemptions. See [Setting Up the Zip/City/State \(Postal Code\) Table \(WZIP\)](#) for more information on how the system determines how to apply tax or hidden tax to an order.

Numeric, 13 positions with a 2-place decimal; display-only.

Field	Description
Quantity	A series of item status fields updated by the system. Valid values are: Reserved Quantity The number of units for which stock has been reserved. This number is reduced when items are canceled, confirmed, or unreserved using Interactive Reservation. Reserved Date The date when the units were reserved. This date remains blank for items flagged as a non-inventory item. Printed Quantity The number of units for which pick slips have been printed. This number is reduced if the pick ticket is voided or when shipment of the item is confirmed. Printed Date The date when the pick slip was printed. Shipped The number of units that have shipped. This quantity is negative for returns created by entering a negative quantity in order entry. Returned The number of units that the customer has returned. This quantity is zero for returns created by entering a negative quantity in order entry. Canceled The number of units that have been canceled. Sold Out The number of units that are sold out. Number: numeric, 5 positions, display-only. Order Orchestration? If the order line has been assigned to Order Orchestration for fulfillment (brokered backorder) or if the customer is picking up the order at a retail location where the inventory is already available (store pickup), the order line is flagged as backordered and has a Printed quantity here that is equal to the ordered quantity. In this case, the Drop ship flag for the order line is set to <i>D</i> until the order line is fulfilled and the Printed quantity is reduced. See Brokered Backorders or Store Pickup Orders for an overview.

Screen Option	Procedure
Review special handling	Select <i>S/H</i> to advance to the Display Special Handling Screen or Display Custom Special Handling Screen .
Review item availability	Select <i>Availability</i> to advance to the Item Availability Screen .
Review item pricing information	Select <i>Pricing</i> to display the Order Pricing Window .
Review quantities	Select <i>Qtys</i> to display the Order Quantities Window .
Review dates	Select <i>Dates</i> to display the Order Dates Window .
Display item or SKU comments	Select <i>Comments</i> to display the Work with Item/SKU Comments Window .
Review order line messages	Select <i>Msgs</i> to advance to the Item Availability Screen .

Screen Option	Procedure
Review order transaction history	Select <i>History</i> to advance to the Display Order Line History Screen .

Display Hyperlink Screen

Purpose: Use this screen to advance to a linked web page or file for an item.

How to display this screen: Select *Attached Link* for an order detail line at the [Order Inquiry Detail Screen](#). This screen is available only if the link was passed in the `line_hyperlink` attribute of the *Inbound Order XML Message (CWORDERIN)*.

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

Following the link: Click on *Click here to view attached link* to open the link target in a new browser window.



Note:

If the link was passed in upper and lower case, the case is retained.

Troubleshooting the hyperlink for an item:

- The system does not validate that the link passed in the inbound message points to an existing page or file; if the page or file is not available when you click the link, the browser window displays an error.
- If the link does not begin with `http`, then when you click the link, Order Administration appends the same path as the current screen. For example, if the link passed was `images/IMG1234.PDF`, and the screen is located in `http://server:port/oms/`, then Order Administration attempts to open the link at `http://server:port/oms/images/IMG1234.PDF`.
- In order for certain special characters to be created correctly through the *Inbound Order XML Message (CWORDERIN)*, they must be passed as described under [Translating Special Characters](#).
For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).
- Depending on your browser settings, you might be able to display the link by positioning your mouse over the words *Click here to view attached link*, or by right-clicking and selecting *Properties*.
- There is no screen you can use to change or update the Hyperlink field for an item once the order has been created.

Field	Description
Order #	The order number and ship to number associated with the hyperlink. Order#: Numeric, 8 positions; display-only. Ship to#: Numeric, 3 positions; display-only.
Line #	A number the system assigns to each item as it is added to the order. Numeric, 3 positions; display-only.

Field	Description
Item-SKU\description	The item and SKU code, followed by the description of the item and SKU. The description field displays up to 52 positions; however, if the SKU description is truncated, you can display the rest by putting your cursor in the field and advancing it to the right. Item: alphanumeric, 12 positions; display-only. SKU: alphanumeric, three 4-position fields; display-only. Item description: alphanumeric, 120 positions; display-only. SKU description: alphanumeric, 40 positions; display-only.

Display Special Handling Screen

Purpose: This screen depicts the special handling code and charge that apply to an item if it uses regular (that is, not custom) special handling.

How to display this screen: Select *Special Handling* for an item at the [Order Inquiry Detail Screen](#) or at the [Scan Order Detail Screen](#), or select *Special Handling* at the [Display Order Detail Screen \(Reviewing Order Line Detail\)](#).



Note:

If the item has custom special handling, you advance to the [Display Custom Special Handling Screen](#) instead.

Field	Description
Special handling	Represents the type of special handling that applies to an item. Special handling refers to any type of item personalization, such as monogramming, alterations, engraving, etc. The item/SKU offer controls whether the item is eligible for special handling. See Special Handling Overview for more information. The information is defined in the Additional Charges Code table. See Establishing Additional Charge Codes (WADC). Numeric, 2 positions; display-only.
Charge	The charge for special handling of an item. See Special Handling Overview for more information. Numeric, 13 positions with a 2-place decimal; display-only.
Handling information	Free-form instructions about how to customize the item. These fields might be blank if, for example, you use the special handling format only to add a charge to the Handling bucket on the order. The Suppress S/H window field for the additional charge code allows you to suppress the automatic display of the special handling screen in order entry if you use a special handling code for this purpose. Alphanumeric, 30 positions each line; display-only.

Display Custom Special Handling Screen

Purpose: This screen depicts the special handling code and charge that apply to an item that uses custom special handling. The fields on your screen will differ based on how you set up the special handling format detail at the [Create Special Handling Format Detail Screen](#).

For more information on custom special handling information, see:

- [Special Handling Overview](#)
- [Establishing Custom Special Handling Formats \(WSHF\)](#) on how to set up special format detail
- [Working with Items on the Order](#) on how to enter custom special handling information on an order

How to display this screen: Select *Special Handling* for an item at the [Order Inquiry Detail Screen](#) or at the [Scan Order Detail Screen](#), or select *Special Handling* at the [Display Order Detail Screen \(Reviewing Order Line Detail\)](#).

How to display this screen: If the item has regular special handling, you advance to the [Display Special Handling Screen](#) instead.

Field	Description
Special format	Represents the type of special handling that applies to an item. Special handling refers to any type of item personalization, such as monogramming, alterations and emblems. Special handling codes are defined in and validated against the Additional Charge Code table. See Special Handling Overview for more information. Numeric, 2 positions; display-only.
Charge	The charge associated with the special handling applied to this item. See Special Handling Overview for more information. Numeric, 13 positions with a 2-place decimal; display-only.
Label	A special handling option defined for this custom special handling format. Alphanumeric, 15 positions; display-only.
Input	The response selected for each special handling option available in the custom special handling format. These fields might be blank if, for example, you use the special handling format only to add a charge to the Handling bucket on the order. The Suppress S/H window field for the additional charge code allows you to suppress the automatic display of the special handling screen in order entry if you use a special handling code for this purpose. Alphanumeric, 45 positions; display-only.
Charge (Optional charge)	The charge associated with an option in the custom special handling format. This charge is added to the Handling bucket of the order totals. Numeric, 13 positions with a 2-place decimal; display-only.

Display Reserved Order Lines Screen

Purpose: Use this screen to identify reserved, open, and printed quantities for an item on an order.

Pick slip preparation: When the system applies pick slip preparation to an order, the system updates the Reserved Order Line table for each order line included on a pre-generated pick:

- Increments the Qty printed by the quantity on the Pick Control Detail.
- Decrements the Qty remaining by the quantity on the Pick Control Detail.

**Note:**

The system does not update the Qty printed in the Order Detail table during pick slip preparation; this update occurs during pick slip generation. You can review the quantity printed for an order detail line on the [Order Inquiry Detail Screen](#).

See [Applying Pick Slip Preparation to an Order](#) for more information on the updates that are performed.

How to display this screen: Select *Reserved Lines* for an item on the [Order Inquiry Detail Screen](#).

Field	Description
Order line	This field includes the customer number, ship-to number, and the order detail line number, each separated by a hyphen (-). Numeric, 3 positions; display-only.
Qty ordered (Quantity ordered)	The total number of units ordered of the item. Numeric, 5 positions; display-only.
Qty reserved (Quantity reserved)	The total number of units the system has reserved for this item. Reservation may occur immediately at Order Entry or in batch mode at designated intervals. When reviewing item reservation fields, you may need to be aware that these conditions may prevent or delay reservation: • Arrival date, when compared to today's date, is greater than the number of days specified in the Reservation Lead Days (B27) system control value. • The item has been assigned a zone reservation code. Zone reservation coded items are not reserved in order entry; instead they are given a backorder status of Z and are reserved during pick generation. • Bypass res (Bypass reservation) field in the Customer table or for the customer class (see Setting Up the Customer Class Table (WCCL)) is <i>selected</i>. • Quantity ordered is greater than the quantity available to sell. • Quantity ordered is greater than the Reserve quantity maximum value in the Item table • Reservation freeze field in the item/SKU warehouse record is <i>selected</i>. Numeric, 5 positions; display-only.
Cmp (Company)	The code for the company from which the item was reserved. Numeric, 3 positions; display-only.
Whs (Warehouse)	The warehouse shipping the item. An item may be reserved across more than one warehouse if the Split Line Over Multi Whse (B19) system control value is <i>selected</i> . Alphanumeric, 3 positions; display-only.
Reserved	The quantity reserved of the item. Numeric, 5 positions; display-only.

Field	Description
Printed	The number of units for which a pick slip has been printed. The system updates this field when it creates a pre-generated pick for the order line, incrementing this number by the quantity on the Pick Control Detail; see Applying Pick Slip Preparation to an Order. Numeric, 5 positions; display-only.
Remaining (Quantity remaining)	The difference between the quantity reserved and the quantity printed. The system updates this field when it creates a pre-generated pick for the order line, decreasing this number by the quantity on the Pick Control Detail; see Applying Pick Slip Preparation to an Order. Numeric, 5 positions; display-only.
Date	The date the item was reserved. Numeric, 6 positions (in user date format); display-only.
Time	The time the item was reserved. Numeric, 6 positions (HHMMSS format); display-only.

Display Zone Reservation Dates Window

Purpose: You can display shipping zone reservation date information for zone reservation coded items. The zone reservation process is used to restrict order reservation and shipping dates for weather-sensitive items such as plant stock; the Display Zone Reservation Dates pop-up window gives information about the reservation/shipping dates you have set up for this item. See [Shipping Zone Reservation Overview](#).

How to display this window: Select *Zone Resv* for an item at the [Order Inquiry Detail Screen](#).



Note:

If the item/SKU you have selected has no zone reservation code, the window does not open; instead, the system displays a message.

Zone dates do not exist for this item/SKU (XXXXXXXXXXXX/XXXXXXXXXXXX)

Field	Description
Zone start date	The shipping start date for the zone date window; the date you intend to begin shipping this item to the geographic zone in which the ship-to address on this order is located. Numeric, 6 positions, in user date format; display-only.
Zone end date	The shipping end date for the zone window; the last day you specify for shipping this item to this ship-to address. Numeric, 6 positions, in user date format; display-only.

Field	Description
Arrival date	The date this item is scheduled to be shipped to the customer. This date is: - the zone start date if the item was ordered prior to the zone season start date. - the order date if the item was ordered between the zone season start date and zone end date, provided that: - if you use Standard Zone Reservation Rules, the item was available or you took the order before the zone's deferred cutoff date - if you use Alternate Zone Reservation Rules, the item was available or had an open PO quantity - otherwise, this date is the next season's zone start date from the zone reservation dates. See Shipping Zone Reservation Overview for a complete discussion. You can use an order line's Arrival date as a selection criterion in pick slip generation. For zone reservation coded inventory such as plant stock, this selection insures that the item will ship at a date suitable for planting at its destination. Alphanumeric, 6 positions, in user date format; display-only.
Priority	Determines the sequence in which orders receive inventory in the Evaluate Backorders program and the Batch Reservation program. Zone reservation orders are reserved in one of these two programs. Valid values are numbers in the range 0 - 9, where: 0 = Lowest priority 9 = Highest priority If you have entered an override to the default Arrival date in order entry (other than the date of the order), the order Priority is 9 (Highest priority). Overriding the Arrival date for zone reservation orders insures that these orders are fulfilled before lower priority orders. You can use an order's Priority as a selection criterion in pick slip generation. Numeric, 1 position; display-only.
Season	A code identifying the season to which the date window applies. Alphanumeric, 3 positions; optional.
Geo. zone (Geographic zone)	A code identifying the geographic zone to which the date window applies. The country is divided into geographic zones which relate to relative weather conditions. Each of these zones have a different date window during which this item can be shipped. See Creating and Maintaining Geographic Zones (WGZN). Alphanumeric, 3 positions; optional.

Item Availability Screen

Purpose: Use this screen to review the warehouse location and availability of an item.

How to display this screen: Select *Availability* at the [Display Order Detail Screen \(Reviewing Order Line Detail\)](#).

Field	Description
Whse (Warehouse)	A code representing a warehouse containing the item. Numeric, 3 positions; display-only.
Description	The description of the warehouse. Alphanumeric, 30 positions; display-only.
Total avail (Total availability)	The quantity of the item available to sell. Numeric, 7 positions; display-only.
Avail (Available)	The quantity of the item available in the designated warehouse. Numeric, 7 positions; display-only.
B/O (Backorder)	The number of units that customers have ordered that are not available to be shipped. Numeric, 7 positions; display-only.
Open PO (Open purchase orders)	The quantity of the item due for receipt on open purchase orders in the designated warehouse. Numeric, 7 positions; display-only.

Order Pricing Window

Purpose: Use this window to review how the item was priced and any discounts and tax that were applied to the item.



Note:

This pop-up window does not include any *Hidden tax* for the item.

How to display this window: Select *Pricing* at the [Display Order Detail Screen \(Reviewing Order Line Detail\)](#).

Field	Description
Price method	The method the system used to calculate the price of an item, but before applying an order-level discount, such as a source code discount percentage. Valid values, and the corresponding code stored in the Order Detail table, are: • 1 Coupon item price • 2 Customer discount% • 3 Contract price • 4 Special source price • 5 Column price • 6 Quantity break price • 7 Offer price • A Repriced-prorated discount • B Quantity Price Matrix Customer Override • C Use item cost • E Price code • F Customer Price Group • G BOGO • I Repriced-qty break/item • J Repriced Customer Price Group Best Price • K Price table default • L Price Table Level Ovr • N No charge (with cost tracking; source code definition) • O No charge/no cost (source code definition) • R Price override (includes entering as no charge in Order Entry) • T Price table premium • U Upsell Item • V Repriced-volume discount • Y Price table • X Qty Price Matrix • Z Repriced-item category promotion Alphanumeric, 1 position; display-only, assigned by the system.
No charge	This flag indicates if you <i>selected</i> the No charge field in Order Entry. Valid value: <i>Selected</i> = Item price was overridden to no charge in Order Entry.
Add'l chg code (Additional charge code)	A code for the additional charge added to the item. Additional charges may be added because of the source code, the offer, special handling of an item, or for shipping a special item. Additional charges are defined in and validated against the Additional Charges table. See Establishing Additional Charge Codes (WADC). Alphanumeric, 1 position; display-only.
Original price	The offer price of the item before any discount is applied. Customer price group pricing: If you use Customer Price Group Pricing, this price represents the initial price of the item, based on the Price Type defined for the customer price group. Numeric, 13 positions with a 2-place decimal; display-only.
Price	The price the customer is charged for a single unit of the item. This price differs from the original price if any discount or repricing applied. Numeric, 13 positions with a 2-place decimal; display-only.

Field	Description
Discount	The amount of the discount applied to the item. This field is not currently implemented. Numeric, 13 positions with a 2-place decimal; display-only.
Disc applied?	This code identifies whether a discount was applied to the order. Valid values are: - A = A discount percentage was entered on the order header screen, or a discount percentage was defined for the customer. - B = A discount percentage was defined for the source code. Alphanumeric, 1 position; display-only.
Freight charge	The freight override, if any, entered for this item on the order. Numeric, 13 positions with a 2-place decimal; display-only.
Spec handling (Special handling)	The special handling charge, if any, for the item. Numeric, 13 positions with a 2-place decimal; display-only.
Tax	The tax amount that applies to the item. See Tax . Numeric, 13 positions with a 2-place decimal; display-only.
GST (Goods and Services Tax)	The Canadian goods and services tax (GST) that applies to items shipping to Canada. If GST applies, the tax includes this amount. Numeric, 13 positions with a 2-place decimal; display-only.
PST (Provincial Services Tax)	The Provincial Services tax (PST) that applies to items shipping to Canada. If PST applies, the tax includes this amount. Numeric, 13 positions with a 2-place decimal; display-only.
Hidden tax	The amount of hidden tax for the each unit of the item. Numeric, 13 positions with a 2-place decimal; display-only.
Extension	The extended price of the item, calculated as: $\text{Item Price} \times \text{Order quantity} = \text{Extended Price}$ An extended price does not appear for canceled items. Numeric, 20 positions with a 2-place decimal; display-only.

Order Quantities Window

Purpose: Use this window to review various quantity information for the item.

How to display this window: Select Qtys at the [Display Order Detail Screen \(Reviewing Order Line Detail\)](#).

Field	Description
Affect Inv (Affect inventory)	A flag that determines whether the system reduces inventory when you sell the item. Values are: <i>Selected</i> = Reduce inventory. <i>Unselected</i> = Do not affect inventory.

Field	Description
Bypass res (Bypass reservation)	A flag that determines whether the item bypasses immediate reservation, which means the item is not reserved during order entry. - If the Use OROB for Fulfillment Assignment (M31) system control value is selected, the system selects this flag for each order line sent to Order Orchestration for fulfillment assignment. See Brokered Backorders. - If the Use OROB for Fulfillment Assignment (M31) system control value is unselected, items that bypass immediate reservation must be reserved using Interactive Reservation. See Working with Interactive Reservation (MIRV). You can define an item to bypass reservation in the Item table. Values are: <i>Selected</i> = Bypass immediate reservation. <i>Unselected</i> = Do not bypass reservation.
Canceled	The quantity of the item that has been canceled. Numeric, 5 positions; display-only.
Ordered	The quantity of this item originally ordered. Numeric, 5 positions; display-only.
Printed	The quantity of this item printed on a pick slip. This quantity is updated during pick slip generation and reduced when shipment is confirmed. Numeric, 5 positions; display-only.
Reserved	The quantity of this item reserved currently. Numeric, 5 positions; display-only.
Shipped	The quantity of this item shipped. Numeric, 5 positions; display-only.
Sold out	The quantity of this item sold out. Numeric, 5 positions; display-only.
Returned	The quantity of this item that the customer has returned. Numeric, 5 positions; display-only.
Confirmed	The quantity of this item confirmed for shipment. Numeric, 5 positions; display-only.

Order Dates Window

Purpose: Use this window to review various important dates associated with an item on the order. This may help you respond to a customer's questions.

How to display this window: Select *Dates* at the *Display Order Detail Screen (Reviewing Order Line Detail)*.

All of the dates shown in the window appear in user date format.

Field	Description
Arrival date	The date the customer wants to receive the item. Numeric, 6 positions; display-only.
Cancel date	The date when the customer wants to cancel the item if it has not shipped. Numeric, 6 positions; display-only.

Field	Description
Date printed	The date the last pick slip was printed for this item. Numeric, 6 positions; display-only.
Date reserved	The date that inventory was reserved for the item. Numeric, 6 positions; display-only.
Expected ship	The date the backordered item is expected to be available to ship. The expected ship date is cleared once you receive the item in Purchase Order Receiving. Numeric, 6 positions; display-only.
Last BO date (Last backorder date)	The most recent date the system generated a backorder notice. A backorder notice is sent to the customer regarding a shipment delay on an item. Numeric, 6 positions; display-only.
Entered date	The date the item was ordered. Numeric, 6 positions; display-only.
Entered time	The time that the item was ordered. Numeric, 6 positions (HHMMSS format); display-only.

Work with Item/SKU Comments Window

Purpose: Use this window to review any comments for an item or SKU that have the Print code is set to *Window*. Any comments entered at the SKU level display for a SKU'd item; if there are no SKU-level comments, the item-level comments display.

How to display this window: Select *Comments* at the *Display Order Detail Screen (Reviewing Order Line Detail)*. This window also opens automatically if you add an item to the order that is associated with any item/SKU comments whose Print code is set to *Window*; see the [Work with Item/SKU Comments Screen](#) for more information.

Fields	Description
Item	The item you are reviewing or adding to the order. The actual item code is listed, even if you ordered by alias. Alphanumeric, 12 positions; display-only.
Item description (Unlabeled field to the right of the item code)	The first 30 positions of the description of the item. Alphanumeric, 30 positions; display-only.
SKU code	The item's unique characteristics, such as its color or size. The SKU is listed, even for a SKU'd item, only if the item comments that display are associated with the SKU itself rather than the base item. Alphanumeric, three 4-position fields; display-only.
SKU description (Unlabeled field to the right of the SKU)	The first 30 positions of the description of the SKU. Alphanumeric, 30 positions; display-only.

Fields	Description
Comments	The comments associated with the item or SKU. If there are any comments associated with the SKU ordered, the window displays these comments; otherwise, it displays any comments entered for the base item. The window displays only item comments whose Print code is set to <i>Window</i>. The window displays up to 10 lines. A plus sign (+) indicates that there are additional lines. To review additional comment lines, select <i>Next</i>. Alphanumeric, 50 positions each line; display-only.

Display P/O Drop Ship Screen

Purpose: Use this screen to track the status of drop ship orders fulfilled through integration with Order Orchestration's Supplier Direct Fulfillment module, or to send a cancel request for a drop ship order to the integrated system.

How to display this screen: At the [Order Inquiry Detail Screen](#) or the [First Display Purchase Order Detail Screen](#), select *D/S Status* next to a drop ship item you fulfill through Order Orchestration's Supplier Direct Fulfillment module, provided you have already sent the purchase order information to the integrated system.

For more information: See [Supplier Direct Fulfillment Processing](#) for background.

Field	Description
All fields on this screen are display-only.	
Order #	The order number and ship-to number. Order number: numeric, 8 positions. Ship-to number: numeric, 3 positions.
Line #	The line number on the order. There can be up to 999 detail lines on an order. Numeric, 3 positions.
PO #	The purchase order number assigned by Order Administration when you process drop ship purchase orders. Numeric, 7 positions.
Line #	The purchase order detail line number. There can be up to 999 detail lines on a purchase order. Numeric, 3 positions.
Item	The item code and SKU code, if any. Item code: alphanumeric, 12 positions. SKU code: alphanumeric, three 4-position fields.
Description	The first 30 positions of the item description. The SKU description does not display. Alphanumeric, 30 positions.

Field	Description
Orig exp ship date(Original expected ship date)	The original due date on the purchase order. The original expected ship date is calculated by adding the Lead days for the vendor item and the Drop Ship Lead Days (H36) to the order date; however, if the Arrival date on the order is later than this date, the Arrival date is used as the Original expected ship date. A drop ship purchase order is not eligible for creation through the Selecting Vendors for Drop Ship Processing (MDSP) menu option until the current date plus the number of Lead days in the vendor item table equals or exceeds its due date. Numeric, 6 positions, in user date format.
Revised exp ship date	The date, if any, sent by the vendor indicating when the merchandise will ship. If the vendor has not revised the Original expected ship date, the Revised expected ship date field is blank. If the vendor has revised the due date more than once, the most recent date sent is displayed here. If the vendor revises the expected ship date, Order Administration adds a message to the detail history fields, below and displays the message in the Additional info field. If the vendor subsequently removes the revised expected ship date from the PO line, the revised expected ship date is removed from this field, and Order Administration replaces the message entry.

**Note:**

The revised expected ship date on a drop ship purchase order does not update the expected ship date on the order detail line. As a result, the expected ship date shown on the [Display Order Detail Screen \(Reviewing Order Line Detail\)](#) may differ from the revised expected ship date displayed in this field. The Expected ship date on the order detail line is updated by backorder card processing only. See [Purchase Order Layering and Backorder Notifications](#).

Numeric, 6 positions, in user date format.

Field	Description
Drop ship status	The current status of the drop ship purchase order detail line. Valid statuses are: • <i>Blank</i> - the drop ship purchase order is not flagged to be processed by an integrated system. The Supplier Direct Fulfillment integration does not use a blank status. • <i>Sent</i> - the drop ship purchase order has been created in Order Administration and sent to Order Orchestration's Supplier Direct Fulfillment module, but the integrating system has not yet acknowledged the purchase order. A purchase order line fulfilled through the Supplier Direct Fulfillment module might also be in this status if you have sent a cost change to Order Orchestration. • <i>Open</i> - the drop ship purchase order line has been created in the Order Orchestration module but not yet selected by the vendor for fulfillment. A purchase order line fulfilled through the Order Orchestration module might also be in this status if there have been updates to the purchase order, such as if the vendor has held and then released the line. • <i>In Process</i> - the drop ship purchase order line has been selected (pulled or printed) by the vendor for fulfillment. • <i>Held</i> - the drop ship purchase order line has been held by the vendor. • <i>Cancelled</i> - the drop ship purchase order line has been cancelled. • <i>Shipped</i> - the drop ship purchase order line has been shipped by the vendor, closing the purchase order line and order line. • <i>RA Sent</i> - a return authorization has been created for the purchase order line and sent to an integrated system. Returns are not currently implemented through Order Orchestration's Supplier Direct Fulfillment module. • <i>RA Cancelled</i> - the RA has been cancelled. Returns are not currently implemented through Order Orchestration's Supplier Direct Fulfillment module. • <i>Returned</i> - the drop ship purchase order returned merchandise has been received and posted by the vendor. When the vendor posts a return, the return is received and credited (if not already credited) in Order Administration. Returns are not currently implemented through Order Orchestration's Supplier Direct Fulfillment module. • <i>Invoiced</i> - the vendor has submitted an invoice for the shipment. Not changed when you send address change information to Order Orchestration's Supplier Direct Fulfillment module. Alphanumeric, 10 positions.
Additional info	The most recent text message sent from the vendor regarding the drop ship purchase order line. The vendor enters this message in Order Orchestration's Vendor Portal.

 Note:

The message entry is required in Order Orchestration's Vendor Portal.

Alphanumeric, 50 positions.

Field	Description
Date	The date the transaction was sent either from Order Orchestration to Order Administration, or from Order Administration to Order Orchestration. Numeric, 6 positions, in user date format.
Time	The time the transaction was sent either from Order Orchestration to Order Administration, or from Order Administration to Order Orchestration. Numeric, 6 positions, HH:MM:SS format.
Status	The status of the transaction when it was performed. This status is usually identical to the <i>Drop ship status</i> of the transaction when it was performed except in the case of PO cost updates or PO address changes, in which case the status is listed as: • <i>Change</i> - for PO address changes sent to Order Orchestration. • <i>Cost Chg</i> - for PO cost changes sent to Order Orchestration. This status and accompanying message displays only when you access this screen from PO Inquiry (<i>MPOI</i>). Alphanumeric, 10 positions.
Description	The description of the transaction. System-generated descriptions are: • Drop Ship PO created • PO available to vendor • Vendor selected PO for processing • Vendor released PO • Cancel request sent • Cancel request confirmed • Cancel request rejected • Address change sent to vendor • Cost change sent to vendor (displays only in PO Inquiry) • Drop Ship PO confirmed on XX/XX/XX (date when the update was received in Order Administration; not necessarily the shipment date indicated by the vendor) <i>Vendor messages?</i> In addition to system-generated messages, this field displays messages the vendor enters when updating the status of an order line in Order Orchestration's Vendor Portal: The vendor is required to enter a reason message when putting an item on hold or revising the expected delivery date. The vendor can also enter a reason when releasing a line from hold, or independently of any of these changes. The screen displays the reason entered by the vendor for these activities. <i>No history?</i> No history message is recorded when the vendor accepts or declines an address change, voids and reprints a pack slip, or enters a reason description in Order Orchestration without making any additional changes to the purchase order line.

Field	Description
	 Note: You can confirm shipment of an Order Orchestration drop ship purchase order through the Receiving Purchase Orders (PORC) menu option; however, this option is not recommended. Receiving the drop ship purchase order this way updates the status of the purchase order in Order Administration to X (Closed) but does not affect the status of the purchase order in Order Orchestration, and subsequent vendor actions for the purchase order are not recorded in Order Administration.

Alphanumeric, 33 positions.

Screen Option	Procedure
Request to cancel the drop ship purchase order line	Select <i>Cancel request</i> to send a cancel request to Order Orchestration. When you select this option, the Submit Cancel Request Pop-up Window opens. See Cancelling Order Orchestration Drop Ship Order Lines for processing details.
Review Order Orchestration history and detail	Select Order Broker Detail to advance to the Display Order Broker Details Screen . This option is available only for a line on a retail pickup, delivery, or ship-for-pickup order.

Submit Cancel Request Pop-up Window

How to display this screen: Select *Cancel request* at the [Display P/O Drop Ship Screen](#).

Field	Description
Enter cancel reason	Enter the reason for cancelling the drop ship purchase order and click <i>OK</i> to submit a cancellation request. Cancel reason codes are defined in and validated against the Cancel Reason table. See Establishing Cancel Reason Codes (WCNR). The cancel reason code is saved in the P/O Detail Drop Ship Order table (<i>PODTDS</i>); if the cancellation is confirmed by the vendor, the system uses this reason code on the order detail line and the drop ship purchase order. Numeric, 2 positions; required.

Options Available in Order Inquiry

Purpose: You can use the function (command) keys on the [Order Inquiry Header Screen](#) and [Order Inquiry Detail Screen](#) to display more information about the quote or order or the customers on the quote or order.

**Note:**

The table describes an option twice if it is used in different ways on the header and detail screens.

Screen Option	Procedure
Review additional charges	Select Additional Charges to advance to the Display Additional Charges Screen .
Review bill-to customer Information	Select Bill To to advance to the Work with Bill To Phone Numbers Screen .
Display the Order Inquiry header or detail screen	Select Detail to toggle between the Order Inquiry Header Screen and Order Inquiry Detail Screen .
Display invoices	Select Display Invoices to advance to the Display Invoices Screen .
Maintain the quote or order	Select Maintain to advance to the Work with Order Screen in Order Maintenance . If the order is locked because, for example, a user's session ended unexpectedly when maintaining it, you can use Unlocking a Stranded Order or Batch (MULO) to unlock the order.
Review order messages	Select Messages to advance to the Work with Order Messages Screen .
Review pick slips, send customer letters, review demographic information, work with customer notes or customer action notes, review order totals across all recipients, work with subscriptions, or display invoice information	Select More Options to advance to the Display More Options Screen screen, where you can select the individual option.
Review order history	Select Order History to advance to the Display Order History Screen .
Display a summary screen that lists the items ordered for the current order plus all recipient orders; optionally, display the order totals expressed in the customer's currency	Select Order Totals to advance to the Display Order Summary Screen .
Review order payment methods	Select Pay Methods to advance to the Display Order Payment Methods Screen .
Display order properties	Select Properties to advance to the Display Order Properties Screen .

Screen Option	Procedure
Review refund information	Select Refunds to advance to the Display Refunds for Order Screen .
View multiple ship-to recipients	Select Recipients to advance to the First Display Customer Screen if there is more than one recipient on the order.
Scan order detail	Select Scan Lines to advance to return to the Scan Order Detail Screen .
Review ship-to customer Information	Select Ship To. • If you define a One Time Ship To address for the order, the system advances you to the Display Alternate Address Screen. See Assigning an Order Shipping Address for information on assigning a one-time ship-to address. • If a ship to is not defined for the order, the system advances you to the Display Customer (1 of 2) screen for the sold to customer on the order. See Creating and Updating Sold-to Customers (WCST). • If a ship to recipient is defined for the order, the system advances you to the Display Customer (1 of 2) screen for the recipient customer on the order. See Creating and Updating Sold-to Customers (WCST). • If a permanent ship to is defined for the order, the system advances you to the Display Ship To screen. See Creating and Updating Sold-to Customers (WCST) for information on permanent ship-to addresses.
Review sold-to customer Information	Select Sold To at the Order Inquiry header screen to advance to the Display Customer screens. See Creating and Updating Sold-to Customers (WCST) .

Display Alternate Address Screen

Purpose: Use this screen to review the one-time shipping address for the order that will be linked to the current order only; no secondary customer record is filed with this address to use on future orders.

See [Assigning an Order Shipping Address](#) for more information on assigning a one-time ship-to address.

How to display this screen: Select Ship To at the Order Inquiry Header Screen or the Order Inquiry Detail Screen.

Field	Description
Order#	A unique number assigned by the system to identify an order. Every order on the system is assigned an order number. This number is used in Order Inquiry to review information for the order. This number is also used throughout the system to access information on an order. You cannot update this number. Numeric, 8 positions; display-only, assigned by the system.
Ship-to number (unlabeled field)	A hyphen (-) separates this field from the Order# field. The system assigns a sequential ship-to number to every shipping address on an order, even if the shipping address and the sold-to address are the same. The first ship-to address is assigned the number 1. You cannot update this number. Numeric, 3 positions; display-only, assigned by the system.

Field	Description
Store#	The store number and description of the store location selected for a ship-for-pickup order, if selected at the Store. In this case, the description also defaults to the Company field. If the store description exceeds 35 positions, it is truncated. Store number: alphanumeric, 10 positions; display-only. Store description: alphanumeric, 35 positions; display-only.
Ship To Name	The company name, last name, first name, and middle initial of the one-time ship to customer. Company: Alphanumeric, 30 positions; display-only. Last name: Alphanumeric, 25 positions; display-only. First name: Alphanumeric, 15 positions; display-only. Initial: Alphanumeric, 1 position; display-only.
Address	Four address fields are available: Address line #1 The customer's street address. Alphanumeric, 32 positions; display-only. Address lines #2-#4 (unlabeled fields under initial Address field): Additional address fields for international or business addresses. Alphanumeric, 32 positions; display-only.
Apt/Suite (Apartment/Suite)	The customer's apartment, suite, rural route, or floor number. Alphanumeric, 10 positions; display-only.
City	The city where the customer receives mail the shipment. Alphanumeric, 25 positions; display-only.
State	The state or province where the customer receives the shipment. Alphanumeric, 2 positions; display-only.
Zip	The postal code or zip code for this customer. Alphanumeric, 10 positions; display-only.
Country	The code for the customer's country. Alphanumeric, 3 positions; display-only.
Delivery code	Identifies a business (commercial) or residential address. Used when you ship an order by a carrier that uses business or consumer rate tables (such as UPS). • B =Business rate table will be used to determine shipping charges. • R =Residential rate table will be used to determine shipping charges. Alphanumeric, 1 position; display-only.
E-mail address	The email address associated with the ship-to mailing address. The email address is upper and lower case. Alphanumeric, 50 positions; optional.

Field	Description
Phone	The phone number for the one-time shipping address. Where does this phone number come from? If the shipping address was added to the order through: • order entry or order maintenance: the phone number entered at the Create One Time Ship To Address Screen or the Change One Time Ship To Address screen. • the order API: the ship_to_day_phone passed in the CWOderIn message if the ship_to_type is 1. If no ship_to_day_phone is passed, the system uses the ship_to_eve_phone. Otherwise, if neither the ship_to_day_phone or the ship_to_eve_phone is passed, the ship-to phone number is left blank; the ship_to_fax_phone is not used. See <i>Generic Order Interface (Order API)</i> for background. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). • the Order Orchestration integration (retail pickup or delivery order): From the phone1, if any, passed from Order Orchestration for the ship-to address for the first item. If no phone1 is passed for the first item, then the phone2 for the first item is used. Otherwise, if neither the phone1 or phone2 is passed for the first item, the ship-to phone number is left blank; the phone numbers for any additional item(s) are not used. See Retail Pickup (including Ship-for-Pickup) or Delivery Orders for background. Note: Creating a ship-for-pickup or store pickup order does not automatically update the phone number field, because the Store Cross Reference information for the selected store defaults to the Order Ship To Address, and a phone number is not part of the Store Cross Reference table. Telephone number format: You can define a telephone number format to map to the phone numbers operators enter into the system. Telephone number formats are defined by arranging numbers and special characters such as hyphens and parenthesis in the same order and position as the numbers in a phone number would display. When an operator enters a phone number, the system compares the number of numeric characters in the phone number with the telephone number formats you have defined. In order to match a format, the phone number must have the same number of numeric positions as a telephone number format. If the system cannot find a match, the phone number does not map to a telephone number format and displays as it was entered by the operator. See Work with Telephone Number Format Screen form more information. Alphanumeric, 14 positions.

Reviewing Financial Information on an Order

Purpose: From the [Order Inquiry Header Screen](#) and [Order Inquiry Detail Screen](#), you can advance to screens that display financial information for an order.

You can use these screens to review and evaluate invoices, refunds, additional charges, order totals and items ordered, as well as order payment methods, credit card authorization history, deposit history and order payment history.

In this topic:

for information on	select	to advance to
Invoices	<i>Display Invoices</i>	Display Invoices Screen • Order Receipt Display Invoice Header Screen Display Invoice Pay Methods Screen Display Invoice Payment Method Screen (Reviewing Detail) First Display Invoice Detail Screen • Second Display Invoice Detail Screen Second Display Invoice Detail Screen Display Invoice Detail Pay Methods Screen Invoice Detail Charges Screen Invoice Pay Summary Screen Change Invoice Pay Method Screen • Working with Rejected Deposits • Changing Credit Card Information for an Invoice Payment Method Display Invoice Pay Method Screen (Reviewing Deposit Information) Display Invoice Address Screen (Billing Address) Display Invoice Address Screen (Shipping Address)
Order Payment Methods	<i>Pay Methods</i>	Display Order Payment Methods Screen Display Order Pay Type Screen (1 of 2) Display Order Pay Type Screen (2 of 2) Display Authorization History Screen Authorization History Details Window Display Deposit History Screen Display Deposit History Detail Screen Display Order Payment History Screen Display Authorization Reversals Screen Note: The Display Contributions screen is not currently implemented.
Additional Charges	<i>Additional Charges</i>	Display Additional Charges Screen
Refunds	<i>Refunds</i>	Display Refunds for Order Screen
Order Summary	<i>Order Totals</i>	Display Order Summary Screen Displaying Order Totals in Foreign Currency • If no Currency is Defined for the Country

Reviewing Invoices

Display Invoices Screen

Purpose: Use the invoice function from within standard Order Inquiry to review and print invoice detail on shipments. As you build an order, the system keeps a record of each

shipment you make against the order. Similarly, the system creates a record of each credit against the order for returns, cancellations, and overpayments.

The Display Invoices screen lists the invoices or credits the system has generated for the order you are reviewing and provides access to each additional invoice-related screen.

Consolidate invoice? The [Consolidated Invoice \(B49\)](#) system control value indicates whether to consolidate multiple shipments for an order on the same system date under the same Invoice Header number. The [Invoice Consolidation Method \(E29\)](#) controls whether the system consolidates invoices for each separate ship-to for an order, or for the order as a whole.

Invoice consolidation does not apply when you express-bill an order or create a credit invoice.

 Important:

In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date.

Also, if a billing or shipping address changes between shipments and the [Capture Addresses for Invoice \(J24\)](#) system control value is *selected*, this can prevent the invoice from consolidating. Even if the invoice is consolidated, there is a separate entry at this screen for each unique billing address/shipping address combination if the [Capture Addresses for Invoice \(J24\)](#) system control value is *selected*.

For more information: See the [Invoice Consolidation Method \(E29\)](#) system control value for a discussion.

 Note:

On orders subject to VAT and tax-inclusive pricing, the invoice screens described in this section display the tax-inclusive price that the customer sees; in other words, the hidden tax amount is not visible. You can review the hidden tax amount for an item by advancing to the [Invoice Detail Charges Screen](#).

Invoice creation for ship-for-pickup orders: If the Invoice Ship For Pickup Order Once Intransit (M73) system control value is selected, the invoice is created for an item on a ship-for-pickup order once the system receives notification from Order Broker that the order line is in transit from the sourcing location to the pickup location, has been received at the pickup location, or has been fulfilled. See that system control value for more information.

How to display this screen: Select *Display Invoices* at the [Order Inquiry Header Screen](#) or [Order Inquiry Detail Screen](#).

Field	Description
Order #	The number the system has assigned to this order. Numeric, 7 positions, display-only.

Field	Description
Ship-to	The number of the ship-to address on the order. The number of the ship-to you were displaying when you selected <i>Invoices</i> defaults in this field, but you can also review invoices for the other ship-to records on the order from this screen. Numeric, 3 positions; optional.
Invoice #	The number the system assigns to a customer's bill or credit. The system generates an invoice during billing. The <i>Consolidated Invoice (B49)</i> system control value <i>selected</i> controls whether two shipments to the same billing and shipping addresses on the same billing date are consolidated into the same Invoice Ship To record, producing a single entry on this screen. <i>Multiple entries for same invoice:</i> The system uses the same invoice number for separate shipments that occur on the same billing date if the Consolidated Invoice system is <i>selected</i>, and, - the <i>Invoice Consolidation Method (E29)</i> is set to <i>ORDER</i>, and the shipments were made for separate order ship-to's, or, - the <i>Invoice Consolidation Method (E29)</i> is set to <i>ORDER SHIP</i>, and the shipments were made for the same order ship-to, and the billing and shipping addresses were the same for the shipments. When consolidating invoices as described above, the system creates a single Invoice Header record (and a single invoice number), but separate Invoice Ship To records. See the <i>Invoice Consolidation Method (E29)</i> for a discussion and examples.
	 Note: In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date.
	<i>Assigned when?</i> If the Generate Invoice Number at Pick Gen (H80) or Generate Invoice # at Pick Gen without Address Match (K81) system control value is selected, the system assigns the invoice number at pick slip generation if the order is eligible; otherwise, it assigns the invoice number at billing. <i>Invoice address?</i> If the <i>Capture Addresses for Invoice (J24)</i> system control value is <i>selected</i>, the shipping and billing addresses for each Invoice Ship To are stored in the Invoice Address table; you can use the Display Invoice Address Screen (Billing Address) and Display Invoice Address Screen (Shipping Address) to review them. Numeric, 7 positions; optional.
Date	The date the invoice record was created by billing. This is the Start date for the billing async job. Numeric, 6 positions (in user date format); display-only.

Field	Description
Type (Invoice type)	Indicates the type of invoice: • <i>C</i> = Credit memo. Generated when you process a return. Credit and return amounts appear as negative numbers when you review invoice information. • <i>I</i> = Invoice. Generated when you bill a shipment. The system does not consolidate credit invoices with other credits or with debit invoices. Alphanumeric, 1 position; display-only.
Total	The total of the invoice. Credit invoice amounts include a minus sign. Numeric, 20 positions with a 2-place decimal; display-only.
Net Bill	Indicates whether the invoice is currently pending Credit Card Net Exchange Billing. • * = the invoice is currently pending credit card net exchange billing. The system considers an invoice pending for credit card net exchange billing if the Invoice Payment Method record contains the <i>EXC</i> flexible payment option code in the IPM FPO Payment Code and the invoice has not yet been deposited (the IPM Deposit created date is blank). • blank = the invoice is not pending credit card net exchange billing.
Date Printed	The date the invoice was printed. Numeric, 6 positions (in user date format); display-only.

Screen Option	Procedure
Display invoice header	Select <i>Invoice</i> for an invoice to advance to the Display Invoice Header Screen .
Display payment methods records	Select <i>Pay Methods</i> for an invoice to advance to the Display Invoice Pay Methods Screen .
Display invoice details for particular items	Select <i>Details</i> for an invoice to advance to the First Display Invoice Detail Screen .
Display the billing address for an invoice	Select <i>Billing Address</i> for an invoice to advance to the Display Invoice Address Screen (Billing Address) .
Display the shipping address for an invoice	Select <i>Shipping Address</i> for an invoice to advance to the Display Invoice Address Screen (Shipping Address) .
Display invoice payment summary information	Select <i>Invoice Pay Summary</i> to advance to the Invoice Pay Summary Screen .
Print an order receipt for each ship-to on the order	Select <i>Order Receipt</i>. See the Order Receipt for more information. • This option is available only if the Order Receipt Print Program (L46) specifies a program and there are any invoices currently displayed on the screen. For example, if there is an invoice for the first ship-to, but you have positioned to the second ship-to, the option is not displayed. • Selecting this option for a multi-recipient order generates a receipt for each ship-to that has had any shipments. • The screen displays an error message when you select this option if the only invoices on the order are credits: No eligible invoices found to print on Order Receipt.

Display Invoice Header Screen

Purpose: Use this screen to review the basic elements of the invoice, such as the tax, handling, additional charges, hidden freight and gross profit.

How to display this screen: At the [Display Invoices Screen](#), select *Invoice* for an invoice.

Field	Description
Order #	The number the system has assigned to this order. The ship-to number is separated from the order number by a hyphen. Order number: numeric, 7 positions, display-only. Ship-to number: numeric, 3 positions; display-only.
Invoice #	The number the system assigns to a customer's bill. <i>Assigned when?</i> If the Generate Invoice Number at Pick Gen (H80) or Generate Invoice # at Pick Gen without Address Match (K81) system control value is selected, the system assigns the invoice number at pick slip generation if the order is eligible; otherwise, it assigns the invoice number at billing. Numeric, 7 positions; display-only.
Type (Invoice type)	Represents the type of invoice. Valid values are: <i>Credit memo</i> = The system generates a credit memo whenever you process a return through Order Maintenance, Order Entry (by entering a negative order quantity), or through Return Authorizations. <i>Invoice</i> = The system generates an invoice when you confirm shipment of an item. Display-only.
Invoice print date	The date you printed the invoice or credit memo. Numeric, 6 positions (in user date format); display-only.
Merchandise	The total value of the merchandise. Merchandise amount does not include tax, handling, additional charges, or freight. Numeric, 20 positions with a 2-place decimal; display-only.
Cost	The actual cost of the merchandise billed on this invoice.
 Note: The secured feature Display Invoice Cost in O/I (A36) controls whether this screen displays the cost.	
Freight	Numeric, 20 positions with a 2-place decimal; display-only. The freight charges for the invoice. This amount may not be equal to the total of all the line-level freight charges. Numeric, 20 positions with a 2-place decimal; display-only.
G/M (Gross profit margin)	The amount of the merchandise price that exceeds the total cost. You can use gross margin to determine the profit of an order based on each item's selling price. See Determining Gross Profit for more information. The Display Gross Margin (A65) secured feature controls whether this field displays in order entry, maintenance, inquiry and item availability. Numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
G/M% (Gross profit margin percentage)	The percentage of the merchandise price that exceeds the total cost. You can use gross margin to determine the profit of an order based on each item's selling price. See Determining Gross Profit for more information. The <i>Display Gross Margin (A65)</i> secured feature controls whether this field displays in order entry, maintenance, inquiry and item availability. Numeric, 5 positions with a 2-place decimal; display-only.
Tax	The sales tax for the invoice. This field includes GST and PST, if any. This field does not include hidden tax; see the Invoice Detail Charges Screen. Numeric, 20 positions with a 2-place decimal; display-only.
GST	The Canadian Goods and Services Tax, if any. This field displays only if there is a GST charge or credit on the invoice. Numeric, 20 positions with a 2-place decimal; display-only.
PST	The Canadian Provincial Services Tax, if any. This field displays only if there is a PST charge or credit on the invoice. Numeric, 20 positions with a 2-place decimal; display-only.
Handling (Handling charge)	The cost of any special handling on the order, such as personalizing, monogramming, or engraving, and any gift wrapping charges. Any duty charges on the invoice are included in this total. See First Display Invoice Detail Screen for information on duty charges on an invoice. Numeric, 20 positions with a 2-place decimal; display-only.
Add'l charges (Additional charges)	The total charges exceeding standard charges on the current order. The system validates additional charges, which are entered manually or automatically assigned against the Additional Charges table during Order Entry. Additional charges may include: <i>Additional source code charge:</i> An additional charge for services that apply to the source code or offer. These charges apply if you have set up a service charges table for the source code or offer. The system applies the additional charge to the order based on the total value of the merchandise. <i>Additional shipper/item charge:</i> An additional charge that applies to the item, depending on the shipper you select to deliver the item. Such charges may apply when the item exceeds established shipping rate charges. For example, delivery of an oversized item may incur an additional shipper/item charge. Additional shipper/item charges apply when defined for the shipper. <i>Ad hoc charge:</i> An additional charge, such as a charge for a gift box, that you assign at order entry. You initially define ad hoc charges in the Additional Charges table. <i>Dollar discount:</i> An additional charge (credit) that is applied based on the total value of the merchandise.

**Note:**

The Add'l charges field in standard Order Inquiry corresponds to the Chg field on Order Entry.

Numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
Add'l freight (Additional freight charges)	The total amount for freight charges exceeding the order's base freight charge. This is a shipper-level charge directly associated with the order, as opposed to the line item. Additional freight is defined for the shipper in the Ship Via table. Examples of additional freight charges that might apply include charges for overnight shipping, second day delivery, padded van, etc. Additional freight charges may include the standard freight charges, depending on how you have set up the shipper. In this case, the Freight field is blank.

**Note:**

The Add'l freight field in standard Order Inquiry corresponds to the Frt+ field in Order Entry.

	Numeric, 20 positions with a 2-place decimal; display-only.
Total	The total amount billed or credited, including all related merchandise charges, freight, tax, handling, additional charges, and additional freight. Numeric, 20 positions with a 2-place decimal; display-only.
Discount amount	The difference between the actual price charged for items and the offer prices. Comparing this amount to the original offer price gives you an indication of the amount that the order varied from the original offer price. A negative amount in Indicates a charge greater than the original offer price. <i>Price overrides:</i> When you override the price of an item, the system uses the following rules in determining what portion of the selling price constitutes a discount: - If the price override reason code's <i>Override item offer price</i> field is <i>selected</i>, the discount amount equals the difference between the override price entered and the final selling price; in other words, it equals any additional discounts applied after the price override. <i>Example:</i> The price override amount entered was \$10.00 and an additional discount coupon of \$1.00 was applied; the discount amount is \$1.00. - If the price override reason code's <i>Override item offer price</i> field is <i>unselected</i> and an item/SKU offer price exists, the discount amount equals the difference between the offer price and the selling price. <i>Example:</i> The item offer price is \$15.00, the price override amount entered was \$10.00, and an additional coupon discount of \$1.00 was applied; the discount amount is \$6.00. - If the price override reason code's <i>Override item offer price</i> field is <i>unselected</i> and an item/SKU offer price does not exist, the discount amount equals the selling price of the item, presented as a negative number. <i>Example:</i> The price override amount entered was \$10.00 and an additional coupon discount of \$1.00 was applied; the discount amount is -\$9.00.

Field	Description
	See Overriding the Item/SKU Offer Price for an overview.

**Note:**

The setting of the [Override item offer price](#) field has no effect on orders you receive through the order API. If there is a price override reason code in the inbound order message, the system always processes these orders as if the field is *unselected*.

Hidden freight

Numeric, 20 positions with a 2-place decimal; display-only.

The amount of the merchandise charge that represents hidden freight. Hidden freight, defined at the Item Offer level, is a freight charge that you want to track but not reveal to the customer.

**Note:**

Hidden freight will not appear on this screen if you override an item price in Order Entry.

Numeric, 13 positions with a 2-place decimal; display-only.

Display Invoice Pay Methods Screen

Purpose: Use this screen to review the distribution of payment methods on an order invoice, and to select a specific payment method for detailed review.

How to display this screen: At the [Display Invoices Screen](#), select *Pay Methods* for an invoice.

How to use this screen: Use this screen to review summary information on invoice payment method records; in addition, you can review a payment method by selecting *Display* for it.

See [Display Invoice Payment Method Screen \(Reviewing Detail\)](#) for field descriptions.

Display Invoice Payment Method Screen (Reviewing Detail)

Purpose: Use this screen to review detailed information, including unpaid balances, for a specific payment method used on the order.

How to display this screen: At the [Display Invoice Pay Methods Screen](#), select *Display* for a payment method.

Field	Description
Order #	A number the system assigns to uniquely identify an order. Numeric, 8 positions; display-only.
Invoice #	A number the system assigns to uniquely identify an invoice. Numeric, 7 positions; display-only.

Field	Description
Pay method	Represents the method of payment on the order. Pay method codes are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY) . Numeric, 2 positions; display-only.
Description	The description of the payment method code. Alphanumeric, 30 positions; display-only.
Merchandise	The total value of the merchandise. Merchandise amount does not include tax, handling, additional charges, duty or freight. Numeric, 20 positions with a 2-place decimal; display-only.
Merchandise balance	The unpaid portion of the merchandise total. Numeric, 20 positions with a 2-place decimal; display-only.
Freight	The freight charges for the invoice assigned to the payment method. Numeric, 20 positions with a 2-place decimal; display-only.
Freight balance	The unpaid portion of the freight. Numeric, 20 positions with a 2-place decimal; display-only.
Add'l freight (Additional freight charges)	The total amount for freight charges exceeding the order's base freight charge. Additional freight reflects charges that are specific to the carrier, as defined for the shipper in the Ship Via table. See Working with Ship Via Codes (WVIA) . <i>Example:</i> Additional freight charges that might apply include charges for overnight shipping, second day delivery, padded van, etc. Additional freight charges may include the standard freight charges, depending on how you have set up the shipper. Numeric, 20 positions with a 2-place decimal; display-only.
Additional freight balance	The unpaid portion of the additional freight balance charge. Numeric, 20 positions with a 2-place decimal; display-only.
Add'l charges (Additional charges)	The total charges exceeding standard charges on the current order. The system validates additional charges against the Additional Charges table during Order Entry. See Establishing Additional Charge Codes (WADC) . Numeric, 20 positions with a 2-place decimal; display-only.
Additional charges balance	The unpaid portion of the additional charges. Numeric, 20 positions with a 2-place decimal; display-only.
Handling (Handling charge)	The cost of any special handling on the order, such as personalizing, monogramming, or engraving, and any gift wrapping charges. This field includes the duty charges, if any, for the payment method. Numeric, 20 positions with a 2-place decimal; display-only.
Handling balance	The unpaid portion of the handling charge and/or duty charge, if any. Numeric, 20 positions with a 2-place decimal; display-only.
Tax	The total sales tax that applies to the shipment on this payment method. This total does not include any hidden tax. Numeric, 20 positions with a 2-place decimal; display-only.
Tax balance	The unpaid portion of the taxes on the shipment on this payment method, excluding hidden tax. Numeric, 20 positions with a 2-place decimal; display-only.
Total	The total for the pay method, including merchandise, freight, additional freight, additional charges, handling and tax. Numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
GST (Goods and Services tax)	The Canadian federal Goods and Services tax that applies to the shipment on this payment method. Numeric, 20 positions with a 2-place decimal; display-only.
GST balance	The unpaid portion of the Canadian federal Goods and Services tax on the shipment on this payment method. Numeric, 20 positions with a 2-place decimal; display-only.
PST (Provincial Services Tax)	A Canadian provincial services tax that applies to the shipment on this payment method. Numeric, 20 positions with a 2-place decimal; display-only.
PST balance	The unpaid portion of the Canadian provincial services tax. Numeric, 20 positions with a 2-place decimal; display-only.
Order level freight	Freight charges that apply to the total shipment. Numeric, 20 positions with a 2-place decimal; display-only.
Order level freight	The unpaid portion of the order level freight balance charged on the shipment. Numeric, 20 positions with a 2-place decimal; display-only.
Order level freight tax	The total freight tax on the shipment, excluding hidden tax. Numeric, 20 positions with a 2-place decimal; display-only.
Order level freight tax balance	The unpaid portion of the order level tax charged on the shipment, excluding hidden tax. Numeric, 20 positions with a 2-place decimal; display-only.
Deposit created	The date the deposit was created. Numeric, 6 positions (in user date format); display-only.
Adjusted Amt	The adjusted deposit amount after performing Credit Card Net Exchange Billing . Numeric, 20 positions with a 2-place decimal; display-only.
Deposit To Date	The total amount deposited for the pay method, including merchandise, freight, additional freight, additional charges, handling and tax. Numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
Suppress deposit	Indicates whether the system will include this invoice payment method when you run Processing Auto Deposits (SDEP). Valid values are: <i>Selected</i> = The system will not attempt to deposit this payment method. <i>Unselected</i> = This payment method will be included when you process deposits. The system determines how to set this flag based on the setting of the Suppress deposit flag at the Display Order Pay Type Screen (1 of 2). This field can be <i>selected</i> if: - you create the order through the <i>Generic Order Interface (Order API)</i>; see <i>Suppressing Deposits and Refunds</i> for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). - this is a ship-for-pickup order, and the Payment at POS for Ship for Pickup Orders (L60) system control value is selected. See that system control value for background. Only credit card payment methods can have this flag <i>selected</i>. This flag is <i>selected</i> only for the first time that you bill against the payment method; afterward, the system resets the flag for the payment method to <i>Unselected</i>.

First Display Invoice Detail Screen

Purpose: Use this screen to review the invoice details for each item on the order that has been billed, and to select a detail for review.

How to display this screen: At the [Display Invoices Screen](#), select *Details* for an invoice.

Field	Description
Ln # (Line number)	The number of the invoice line on which the item appears. Numeric, 3 positions; display-only.
Item # (Item code)	Represents a unit of inventory. Item codes are defined in and validated against the Item table. See Performing Initial Item Entry (MITM). Alphanumeric, 12 positions; display-only.
SKU (Stock keeping unit)	A code that defines an item's special characteristics, such as size and color. SKU codes are defined in and validated against the SKU table. Alphanumeric, three 4-position fields; display-only.
Ship qty (Shipped quantity)	The shipped quantity of the invoiced item. The quantity is negative in the case of a return. Numeric 5 positions; display-only.
Price	The actual unit price of the shipped or returned item. Numeric, 13 positions with a 2-place decimal; display-only.
Ship date	The date the invoice line shipped or the return was processed. This is the Start date from the billing async job. Numeric, 6 positions (in user date format); display-only.
Return qty (Return quantity)	The quantity of the item billed on this invoice that the customer has returned. Numeric, 5 positions; display-only.

Field	Description
Return date	The most recent date when the customer returned any quantity of the item billed on this invoice. Numeric, 6 positions (in user date format); display-only.

Option	Procedure
Display invoice detail for an item	Select <i>Display</i> for an item to advance to the Second Display Invoice Detail Screen .
Display payment methods for an item	Select <i>Display pay methods</i> for an item to advance to the Display Invoice Detail Pay Methods Screen .
Display invoice detail charges for an item, such as duty	Select <i>Detail charges</i> for an item to advance to the Invoice Detail Charges Screen .

Second Display Invoice Detail Screen

Purpose: Use this screen to review the charges for particular items on the invoice.

How to display this screen: Select *Display* for an invoice at the [First Display Invoice Detail Screen](#).

Field	Description
Pick control #	A number the system assigns to uniquely identify a pick slip. Numeric, 7 positions; display-only.
Qty shipped (Quantity shipped)	The total quantity of the item you have shipped to the customer. The shipment date appears to the right. Quantity: numeric, 5 positions; display-only. Date: numeric, 6 positions (in user date format); display-only.
Qty returned (Quantity returned)	The total quantity of the item returned by the customer. The return date appears to the right. Quantity: numeric, 5 positions; display-only. Date: numeric, 6 positions (in user date format); display-only.
Qty credited (Quantity credited)	The total quantity of the item for which you have credited the customer. The system does not track the credit date. Quantity: numeric, 5 positions; display-only.
Price	The unit price of the item. Numeric, 13 positions with a 2-place decimal; display-only.
Cost	The unit cost of the item. Numeric, 13 positions with a 4-place decimal; display-only.
Freight	The total extended freight charge for all units of this item. Only line-level freight charges appear on this screen. Numeric, 20 positions with a 2-place decimal; display-only.
Discount	The total extended discount amount applied to all units of this item. <i>Price overrides:</i> When you override the price of an item, the system uses the following rules in determining what portion of the selling price constitutes a discount:

Field	Description
	- If the price override reason code's Override item offer price field is <i>selected</i>, the discount amount equals the difference between the override price entered and the final selling price; in other words, it equals any additional discounts applied after the price override. <i>Example:</i> The price override amount entered was \$10.00 and an additional discount coupon of \$1.00 was applied; the discount amount is \$1.00. - If the price override reason code's Override item offer price field is <i>unselected</i> and an item/SKU offer price exists, the discount amount equals the difference between the offer price and the selling price. <i>Example:</i> The item offer price is \$15.00, the price override amount entered was \$10.00, and an additional coupon discount of \$1.00 was applied; the discount amount is \$6.00. - If the price override reason code's Override item offer price field is <i>unselected</i> and an item/SKU offer price does not exist, the discount amount equals the selling price of the item, presented as a negative number. The price override amount entered was \$10.00 and an additional coupon discount of \$1.00 was applied; the discount amount is -\$9.00. See Overriding the Item/SKU Offer Price for an overview. Numeric, 13 positions with a 2-place decimal; display-only.
Tax	The tax amount for the units of the item on the invoice. If a tax override amount is defined for the order line and you process multiple shipments against the line, the system prorates the tax override amount across the units shipped on the order line to determine the new tax override amount and the tax amount to apply to each shipment. <i>Example:</i> If the tax override amount for the order line is 9.00 and the order quantity is 3, the system charges 3.00 if you ship 1 unit of the item and then charges 6.00 if you ship the remaining 2 units of the item. Numeric, 20 positions with a 5-place decimal; display-only.
Handling	The total extended handling charges for all units of this item.

**Note:**

This handling total does not include any duty charges for the item.

Numeric, 20 positions with a 2-place decimal; display-only.

Display Invoice Detail Pay Methods Screen

Purpose: Use this screen to review information about the payment methods associated with the item shipment/invoice. This information differs from the [Display Invoice Payment Method Screen \(Reviewing Detail\)](#) in that it shows how payment types are applied to shipments of individual items on the order.

**Note:**

The system does not create invoice detail pay method records for returns that you process through Order Maintenance; it creates these records only for returns that you process by entering a negative quantity in Order Entry.

How to display this screen: Select *Display pay methods* for an invoice at the [First Display Invoice Detail Screen](#).

About this screen: This screen displays how a payment method was charged for the shipment of an item.

See [Display Invoice Payment Method Screen \(Reviewing Detail\)](#) for descriptions of the fields on this screen.

**Note:**

The Handling field on this screen includes any duty charges for the item and payment method.

Invoice Detail Charges Screen

Purpose: Use this screen to review any duty, shipper/item, or hidden tax charges for an item.

How to display this screen: Select *Detail charges* for an item at the [First Display Invoice Detail Screen](#).

Field	Description
Charge type	The type of charge on the invoice detail. The description of each charge appears to the right. Valid values are: <i>Duty</i> = The system determines whether to charge duty by comparing the harmonize codes for the item and the duty rates defined for the ship-to country. The duty calculation is described to the right. See Setting Up the Country Table (WCTY). <i>Shipper/Item</i> = This charge is added to the order if you have set up a shipper/item charge for the item with the shipper used Working with Ship Via Codes (WVIA). <i>Vat/Hidden Tax</i> = This charge is included in the item price if the order was subject to tax-inclusive pricing. See Setting Up Order Entry Values for more information on VAT and tax-inclusive pricing. Display-only.
Amount	The amount of the charge for the item. The method for calculating duty charges is indicated in the fields to the right. Numeric, 13 positions with a 2-place decimal; display-only.
Duty rate percent	The percentage the system used to calculate the duty amount. The system multiplies this percentage by the extended item price. Numeric, 5 positions with a 2-place decimal; display-only.
Duty rate amount	The flat rate the system used to calculate the duty amount. The system multiplies this amount by the total unit quantity. Numeric, 20 positions with a 2-place decimal; display-only.

**Note:**

The Invoice Cost Detail screen is not currently implemented.

Display Invoice Address Screen (Billing Address)

Purpose: Use this screen to review the billing address associated with an invoice.

Where does the billing address come from? Depending on how you create the order, the billing address can be:

- the name and address from the Customer Bill to table, if there is a bill-to account associated with the order; otherwise,
- the name and address of the Customer Sold To who placed the order. This customer might differ from a Customer Sold To who receives the order.

How to display this screen: Select *Billing address* for an invoice at the [Display Invoices Screen](#).

**Note:**

This screen is available only if the *Capture Addresses for Invoice (J24)* system control value was *selected* at the time that the system generated the invoice. See that system control value for more information.

Field	Description
Order #	A number the system assigns to uniquely identify an order. Numeric, 8 positions; display-only.
Invoice #	A number the system assigns to uniquely identify an invoice. Numeric, 7 positions; display-only.
Type	Set to <i>Billing Address</i> . Alphanumeric, 15 positions; display-only.
Name	The company name and name for the billing address. Alphanumeric, 41 positions; display-only.
Address	Up to four lines of address information. Alphanumeric, 32 positions each; display-only.
Apt/Suite	The apartment, suite, rural route, or floor number for the billing address. Alphanumeric, 10 positions; display-only.
City/State/Zip	The city, state code, and zip or postal code for the billing address. City: 25 positions; display-only. State: 2 positions; display-only. Zip: 10 positions; display-only.

Display Invoice Address Screen (Shipping Address)

Purpose: Use this screen to review the shipping address associated with an invoice.

Where does the shipping address come from? Depending on how you create the order, the shipping address can be:

- the order-level shipping address, as set up through [Assigning an Order Shipping Address](#)
- a permanent shipping address for the customer, as set up through [Using a Permanent Shipping Address in Order Entry](#)
- a recipient customer, as set up through [Adding a Recipient Order in Order Entry](#)
- the name and address of the Customer Sold To who placed the order

How to display this screen: Select *Shipping address* for an invoice at the [Display Invoices Screen](#).



Note:

This screen is available only if the *Capture Addresses for Invoice (J24)* system control value was *selected* at the time that the system generated the invoice. See that system control value for more information.

Field	Description
Order #	A number the system assigns to uniquely identify an order. Numeric, 8 positions; display-only.
Invoice #	A number the system assigns to uniquely identify an invoice. Numeric, 7 positions; display-only.
Type	Set to <i>Shipping Address</i> . Alphanumeric, 15 positions; display-only.
Name	The company name and name for the shipping address. Alphanumeric, 41 positions; display-only.
Address	Up to four lines of address information. Alphanumeric, 32 positions each; display-only.
Apt/Suite	The apartment, suite, rural route, or floor number for the shipping address. Alphanumeric, 10 positions; display-only.
City/State/Zip	The city, state code, and zip or postal code for the shipping address. City: 25 positions; display-only. State: 2 positions; display-only. Zip: 10 positions; display-only.
Delivery code	A code representing the type of delivery address for a postal code. Valid values are: • <i>B</i> = Business address. • <i>R</i> = Residence. • <i>N</i> = No distinction. • Blank = Delivery code not defined. Some shippers, such as UPS, charge different rates based on the type of delivery address on an order. For example, shipping to a business address is cheaper than shipping to a residential address. You can define the delivery code for a postal area to insure that the best possible rate is charged for shipping an order. Alphanumeric, 1 positions; display-only.

Invoice Pay Summary Screen

Purpose: Use this screen to review invoice payment information, such as:

- the payment plan associated with the invoice, if any
- the total amount deposited to date for each invoice
- the total amount to deposit for each invoice
- the date the deposit is available for processing

How to display this screen: Select *Invoice Pay Summary* at the [Display Invoices Screen](#).

An error message indicates if the [Deferred and Installment Billing \(F51\)](#) system control value is *unselected*:

Deferred/Installment Billing feature required for this function

Field	Description
Order #	A number the system assigns to uniquely identify the order. Numeric, 8 positions; display-only.
Invoice #	The number the system assigns to a customer's bill or credit. Numeric, 7 positions; optional.
Pay type	Represents the method of payment on the order. Pay methods are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY) . Numeric, 2 positions; display-only.
Date (Invoice date)	The date you billed the merchandise. Numeric, 6 positions; display-only.
I/D (Payment plan type)	A value that identifies whether the invoice payment method is associated with a deferred or installment payment plan. Valid values are: • <i>I</i> = The invoice payment method is associated with an installment payment plan. An installment payment plan allows you to break payments into installment amounts, for example, 3 installments of \$30.00 each month. • <i>D</i> = The invoice payment method is associated with a deferred payment plan or the <i>EXC</i> Net Billing for Exchanges plan. A deferred payment plan allows you to defer the payment until a later date, for example, don't pay until January 2007. See Credit Card Net Exchange Billing for more information on the <i>EXC</i> plan. • blank = The invoice payment method is not associated with a payment plan. Alphanumeric, 1 position; display-only.

Field	Description
CC/C status (Credit card credit status)	A value that indicates the credit status of the return. A value only displays in this field if the invoice payment method is associated with a return or exchange. The system does not process a credit card credit against an installment or deferred billing order before the deposit has been processed. This ensures that you do not credit the customer's credit card before the card has been charged. Valid values are: • <i>P</i> = Refund pending. The system updates the status to pending when you perform a return or exchange in order entry, order maintenance or through Work with Return Authorizations and have not yet processed the refund. • <i>R</i> = Refund processed/ready. The system updates the status to processed/ready when you process the refund in Process Refunds. blank = Refund deposited. This field is also blank if the invoice payment method is not associated with a return or exchange. Alphanumeric, 1 position; display-only.
To date (Deposit to date)	The total amount deposited to date. When you process a deposit for an installment payment plan, the system updates this field by the deposit amount. <i>Example:</i> You have an installment payment plan assigned to the order for 3 installments of \$30.00 on the 15th of every month. • The first installment updates this field to \$30.00. • The second installment updates this field to \$60.00. • The third installment updates this field to \$90.00. Numeric, 20 positions with a 4-place decimal; display-only.
Total (Total amount to deposit)	The total amount that needs to be deposited in order for the invoice to be completely deposited. An error message indicates if you try to change an invoice payment method that has been completely deposited: Invoice (399) has been completely deposited and cannot be changed. Numeric, 20 positions with a 4-place decimal; display-only.
Rel date (Deposit release date)	This date indicates when the invoice is eligible for deposit. If this date is equal to or prior to the current date, the invoice payment is eligible for deposit. The system updates this field when a deposit is confirmed with the next deposit release date if there is a remaining amount to deposit, for example, in installment billing. <i>Regular (non-payment plan) Orders:</i> For regular orders, the deposit release date is the same as the invoice date. The deposit is eligible for processing immediately after billing.

Field	Description
	<i>Deferred Orders:</i> For orders containing a deferred payment plan, the deposit release date is either a fixed date or is based on a specific interval. If the date is based on an interval, the interval can be calculated based on order date or invoice date. If the deposit release date is a fixed date, the system compares the fixed date against the invoice date: • If the fixed date is greater than the invoice date, the system will populate the deposit release date with the fixed date. • If the fixed date is less or equal to the invoice date, the system will populate the deposit release date with the invoice date. If the deposit release date is based on an interval and is calculated based on invoice date, the system adds the interval number of days to the invoice date and compares this date against the expiration date: • If the resulting date is less than the expiration date, the system updates the deposit release date with this date. • If the resulting date is equal to or greater than the expiration date, the system will use the expiration date as the deposit release date. • If the expiration date is less than the invoice date, the system will use the invoice date as the deposit release date. <i>Installment Orders:</i> For orders using an installment payment plan, the deposit release date is either the next fixed day of the month or is based on a specific interval. If the deposit release date is based on an interval, the system calculates the next installment interval by adding the interval number of days to the current date. If the deposit release date is a fixed date: • If the fixed day of the month has not been reached, the deposit release date is the fixed day of the current month. • If the fixed day of the month is today or in the past, the deposit release date is the fixed day of the next month. • If the expiration date is earlier than the invoice date, the system uses the invoice date as the deposit release date. <i>Credit Invoices:</i> For a credit invoice payment method, the deposit release date associated with the original invoice is used as long as that date is on or after the current date. If the deposit release date of the original invoice is earlier than the current date, the deposit release date of the credit invoice is updated with the current date. This ensures that the customer is not credited until he has been billed; but if the customer has been billed, the credit is released immediately. Numeric, 6 positions (in user date format); display-only.

Screen Option	Procedure
Change Invoice Pay Method	Select <i>Change</i> for an invoice payment method to advance to the Change Invoice Pay Method Screen. <i>Error messages:</i> The Change Invoice Pay Method screen might display these error messages when you Select <i>Change</i> for an invoice payment method: Pay category must be credit card. This message indicates that the invoice payment is not a credit card payment type. Invoice (397) has been completely deposited and cannot be changed. This message indicates that the invoice payment associated with a deferred or installment payment plan has been completely deposited. Not authorized to change invoice payment information. This error message indicates that you do not have authority to the Change Invoice Payment Information (A82) secured feature.
Display Invoice Pay Method	Select <i>Display</i> for an invoice payment method to advance to the Display Invoice Pay Method Screen (Reviewing Deposit Information) .
Display Deposit History	Select <i>Deposit History</i> for an invoice payment method to advance to the Display Deposit History Screen .
Display Order Payment History	Select <i>Payment History</i> for an invoice payment method to advance to the Display Order Payment History Screen .

Change Invoice Pay Method Screen

Purpose: Use this screen to:

- Review deposit information, such as the total amount to deposit, the amount already deposited and the amount remaining to deposit.
- Review or change the deposit release date, installment information or credit card information.
- Apply a prepaid check or cash payment.

Typically, you use this screen when you receive a rejected deposit for an invoice associated with a deferred or installment payment plan, and you need to change the credit card information before resending the deposit to the service bureau.

How to display this screen: Select *Change* for an invoice payment method at the [Invoice Pay Summary Screen](#). You can also advance to this screen by selecting *Change* for a rejected deposit in Submit Rejected Deposits. See [Processing Auto Deposits \(SDEP\)](#).

Field	Description
Order #	A number the system assigns to uniquely identify the order. Numeric, 8 positions; display-only.
Invoice #	The number the system assigns to a customer's bill or credit. Numeric, 7 positions; display-only.

Field	Description
Pay method	The code and description that represents the method of payment on the order. You can change the payment method associated with this invoice payment method by selecting <i>Change Card Number</i> at the Change Invoice Pay Method screen, for example, the customer's credit card was stolen or the credit card was declined. See Changing Credit Card Information for an Invoice Payment Method. Pay methods are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY). Numeric, 2 positions; display-only.
Invoice date	The date you shipped and billed the merchandise. Numeric, 6 positions; display-only.
Total amount (Total amount to deposit)	The total amount to deposit in order for the invoice to be completely deposited. Numeric, 20 positions with a 2-place decimal.
Adjustment (Deposit adjustment amount)	The amount of the deposit that has been changed or is in transition. The system updates the deposit adjustment amount with this information: • written off deposits • debit and credit netting amounts • deposits pending Numeric, 20 positions with a 2-place decimal; display-only.
Amount deposited (Deposit to date)	The total amount deposited to date. When a deposit is confirmed, the system updates this field by the deposit amount. <i>Example:</i> You have an installment payment plan assigned to the order for 3 installments of \$30.00 on the 15th of every month. The first installment updates this field to \$30.00. The second installment updates this field to \$60.00. The third installment updates this field to \$90.00. When a deposit is confirmed, the system updates this field with the amount deposited. Numeric, 20 positions with a 2-place decimal; display-only.
Remaining (Deposit remaining amount)	The amount remaining to deposit. The system uses this calculation to determine the deposit remaining amount: $\text{deposit amount} - \text{amount deposited to date} - \text{prepaid amount} - \text{adjustment amount} = \text{deposit remaining amount}$ Numeric, 20 positions with a 2-place decimal; display-only.
Card Number	The credit card number the customer used on the order. Information will be provided by Oracle at a later date. You can change the credit card number on the Change Credit Card window. See Changing Credit Card Information for an Invoice Payment Method. Alphanumeric, 20 positions; display-only.

Field	Description
Authorization #	The number used to authorize the credit card payment. The original authorization number from pick slip generation is retained and displays for a payment plan order, even after you receive a full authorization for the deposit. You can change the authorization number on the Change Credit Card window. See Changing Credit Card Information for an Invoice Payment Method. Numeric, 16 positions; display-only.
Expiration date	The date the credit card is no longer active. Information will be provided by Oracle at a later date. Numeric, 4 positions (MMYY format); display-only.
Authorization date	The date you manually authorize a payment method, or the date the payment method receives an authorization from the authorization service. You can change the authorization date on the Change Credit Card window. See Changing Credit Card Information for an Invoice Payment Method. Numeric, 6 positions (in user date format); display-only.
Issue #	An incremental issue number, assigned by some banks when they replace a card because it is lost or stolen. Debit cards might require a start date, an issue number, both, or neither. The Require issue # flag for the pay type controls whether an issue number is required or optional. You can change the issue number at the Change Credit Card for window. See Changing Credit Card Information for an Invoice Payment Method. Alphanumeric, 2 positions; display-only.
Start date	The first date when the card is effective. The Require start date flag for the pay type controls whether the start date is required or optional. Numeric, 4 positions; display-only.
Deposit release date	This date indicates when the invoice is eligible for deposit. If this date is on or earlier than the current date, the invoice payment is eligible for deposit. The system updates this field when a deposit is confirmed with the next deposit release date if there is a remaining amount to deposit, for example, in installment billing. Regular (non-payment plan) Orders For regular orders, the deposit release date is the same as the invoice date. The deposit is eligible for processing immediately after billing.

Field	Description
	<i>Deferred Orders:</i> For orders using a deferred payment plan, the deposit release date is either a fixed date or is based on a specific interval. If the date is based on an interval, the interval can be calculated based on order date or invoice date. If the deposit release date is a fixed date, the system compares the fixed date against the invoice date: • If the fixed date is later than the invoice date, the system populates the deposit release date with the fixed date. • If the fixed date is on or earlier than the invoice date, the system populates the deposit release date with the invoice date. • If the expiration date is earlier than the invoice date, the system populates the deposit release date with the invoice date. • If the deposit release date is based on an interval and is calculated based on invoice date, the system adds the interval number of days to the invoice date and compares this date against the expiration date: • If the resulting date is earlier than the expiration date, the system updates the deposit release date with this date. • If the resulting date is on or later than the expiration date, the system uses the expiration date as the deposit release date. • If the expiration date is earlier than the invoice date, the system populates the deposit release date with the invoice date. <i>Installment Orders:</i> For orders containing an installment payment plan, the deposit release date is either the next fixed day of the month or is based on a specific interval. • If the deposit release date is based on an interval, the system calculates the next installment interval by adding the interval number of days to the current date. • If the deposit release date is a fixed date: • If the fixed day of the month is in the future, the deposit release date is the fixed day of the current month. • If the fixed day of the month is on or earlier than today, the deposit release date is the fixed day of the next month. <i>Credit Invoices:</i> For a credit invoice payment method, the deposit release date associated with the original invoice is used as long as that date is on or after the current date. If the deposit release date of the original invoice is earlier than the current date, the deposit release date of the credit invoice is updated with the current date. You might want to change the deposit release date associated with a credit invoice to allow the credit invoice to process before the debit invoice. This ensures that the customer is not credited until he has been billed. <i>Error Messages:</i> An error message indicates if you enter a date that is later than the expiration date associated with the credit card: Deposit Release Date 110199 greater than Expiration Date 599. An error message indicates if you enter a date that is earlier than today's date: Date entered must not be less than today's date Numeric, 6 positions (in user date format); required.

Field	Description
Rejected deposit (Rejected deposit pending)	An informational message informing you a deposit amount has been rejected by the authorization service. When a deposit amount is rejected, the system: • writes an order payment history message • writes a deposit history record Alphanumeric, 25 positions; display-only.
Rejected (Rejected amount)	The deposit amount that has been rejected by the authorization service. Numeric, 20 positions with a 2-place decimal; display-only.
Resubmit	Indicates whether you wish to resubmit the rejected deposit amount for authorization and deposit. Valid values are: • <i>Selected</i> = Resubmit the deposit to the authorization service. The next time you process deposits, the system includes the rejected deposit amount. • <i>Unselected</i> = Do not resubmit the deposit to the authorization service.
Write off	This flag indicates whether you wish to write-off the total amount to deposit for this invoice payment method, for example, there is no chance of collecting the money from the customer. Valid values are: • <i>Selected</i> = Write off the total amount to deposit for this invoice payment method. • <i>Unselected</i> = Do not write off the total amount to deposit for this invoice payment method.

**Note:**

When you write-off a deposit amount, the amount is written off immediately.

Amt (Write off deposit amount)

The rejected deposit amount you wish to write off.

The system removes the invoice payment method from the Resubmit Reject Deposits screen in Submit Rejected Deposits when you write off a rejected deposit. See [Processing Auto Deposits \(SDEP\)](#).

**Note:**

When you select *OK* to write off a rejected deposit, the write off occurs immediately.

Delete

Numeric, 20 positions with a 2-place decimal; optional.

This flag indicates whether you wish to delete the rejected deposit.

Valid values are:

- *Selected* = Delete the rejected deposit amount.
- *Unselected* = Do not delete the rejected deposit amount.

Field	Description
# of installments	The total number of installments assigned to this invoice payment method. Installment billing allows you to break the payment evenly into installments (for example, 3 payments on the 1st of each month). This field is used with an installment payment plan only. Numeric, 3 positions; display-only.
# remaining installment	The number of installments remaining. This number is the same as the number of installments when the invoice payment method record is first created and reduces by one each time an installment is sent for deposit. This field is used with an installment payment plan only. Numeric, 3 positions; display-only.
Installment interval	The number of days between installments. The system uses this interval number to determine the next deposit release date if you are basing installment dates on intervals, for example, 3 installments in 30 day intervals. The system determines the installment dates based on the order date. For example, if the order date is 09/01/06, the first installment date would be 09/01/06. The system would determine the next installment date by adding 30 days to the first installment date: 09/01/06 + 30 = 10/01/06. Numeric, 3 positions; display-only.
Fixed installment day	The day of the month when an installment is billed. The system uses the fixed installment date if you have defined a fixed date for each installment. For example, if 15 is defined here, each installment would be due on the 15th of every month. Numeric, 2 positions; display-only.
Pay type	Represents a method of payment on the order. You can enter a prepaid amount by entering a cash/check pay type in this field and entering the amount you wish to prepay in the Prepaid amount field. An error message indicates if you enter a pay type other than pay type 1 (cash/check): Pay category must be '1' Cash/Check. Pay types are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY). Numeric, 2 positions; optional.
Prepaid amount	The amount you wish to prepay for this pay method, for example, the customer's credit card was rejected and the customer decides to send you a check instead. If you enter an amount in this field, the system subtracts the amount from the Deposit amount remaining field. <i>Example:</i> Deposit amount remaining = 130.75 Prepaid amount = 5.00 130.75 - 5.00 = 125.75 (this is the remaining amount to deposit) Numeric, 14 positions; optional.
Prepaid to date	The total amount prepaid to date. Numeric, 20 positions with a 2-place decimal.

Screen Option	Procedure
Work with rejected deposits	See Working with Rejected Deposits .
Change credit card information	Select <i>Change Card Number</i> . See Changing Credit Card Information for an Invoice Payment Method .

Working with Rejected Deposits

From the [Change Invoice Pay Method Screen](#) you can also resubmit, write off or delete a rejected deposit amount.

To resubmit a rejected deposit:

Select the Resubmit field and select *OK*. The system sends the rejected deposit amount back to the authorization service for reauthorization. The Rejected amount, Resubmit, Write off, Write off amount and Delete fields are cleared from the screen.

The Change Invoice Payment Method screen displays this error message if you try to reenter the screen and the deposit amount that you have resubmitted completely deposits the amount for the invoice payment:

Invoice has been completely deposited and cannot be changed.

This message displays even if the submitted deposit amount has not been confirmed by the authorization service.

The system also writes an order payment history record indicating the deposit amount was resubmitted.



Note:

When you select *OK* to resubmit, the deposit amount is resubmitted the next time you process deposits.

To write off a rejected deposit:

Select the Write off field and:

- If you wish to write off the remaining amount to deposit for this invoice payment method, select *OK*. You return to the Invoice Pay Summary screen.
- If you wish to write off a specific amount, enter this amount in the Write off amount field and select *OK*. The Confirm Accept window prompts you for confirmation.

When you write off a deposit amount:

- The system updates the Adjustment field with the rejected deposit amount. If you did not enter a specific write off amount, this is the amount remaining to deposit. If you entered a specific write off amount, this is the amount you entered in the Write off amount field.
- The system updates the Remaining field with the amount remaining to deposit. The system determines the remaining amount to deposit using this calculation:

total amount to deposit - write off amount = remaining amount to deposit

For a deferred payment plan:

If the invoice payment method is associated with a deferred payment plan, the system updates the Adjustment field with the write off amount and updates the Remaining field with the remaining amount to deposit, if any.

Example:

Total amount to deposit = 69.00

Rejected deposit amount = 69.00

Write off amount = 30.00

In this situation, the system updates the Adjustment amount field to 30.00 (the write off amount) and updates the Remaining field with 39.00 using this calculation:

total amount to deposit (69.00) - write off amount (30.00) = remaining amount to deposit (39.00)

When you receive an authorization for the deposit, the system updates:

- the Amount deposited field to 39.00
- the Remaining field to .00
- the Adjustment field remains at 30.00 (this is the write off amount)

For an installment payment plan:

If the invoice payment method is associated with an installment payment plan, the system updates the Adjustment field with the write off amount and updates the Remaining field with the remaining amount to deposit, if any. If there is a remaining amount to deposit, the system redistributes the amount remaining across the remaining installment intervals.

Example:

Total amount to deposit = 69.00

Number of installments = 3

Installment amount = 23.00

Rejected deposit amount = 23.00

Write off amount = 30.00

In this situation, the system updates the Adjustment amount field to 30.00 (the write off amount) and updates the Remaining field with 39.00 using this calculation:

total amount to deposit (69.00) - write off amount (30.00) = remaining amount to deposit (39.00)

The system also updates the Installment amount for the remaining installment intervals to 19.50 using this calculation:

remaining amount to deposit (39.00) / the number of remaining installments (2) = installment amount (19.50)

When you receive an authorization for the deposit, the system:

- updates the Amount deposited field to 19.50
- updates the Remaining field to 19.50 (this is the amount of the next installment)
- decreases the Number of remaining installments field by 1
- leaves the Adjustment field at 30.00 (this is the write off amount)

**Note:**

If you write off the remaining amount to deposit for this invoice payment method, the system updates the Adjustment field with the amount remaining to deposit plus the rejected deposit amount and updates the Remaining field with the rejected deposit amount.

To delete a rejected deposit:

Select the Delete field. The system deletes the rejected deposit amount and displays the message Deleted. No further deposits. at the Change Invoice Pay Method screen.

Changing Credit Card Information for an Invoice Payment Method

Purpose: You can change credit card information at the Change Credit Card window. A history message is written, indicating Card Number has been changed. You can review this history at the [Display Order Payment History Screen](#).

How to display this window: Select *Change Card Number* at the [Change Invoice Pay Method Screen](#). Additional information will be provided by Oracle at later date.

Field	Description
Pay method	The code and description that represents the method of payment on the order. <i>Error messages:</i> If you entered a payment method other than a credit card: Pay category must by credit card. If you entered a pay method that is associated with a credit card authorization and deposit service different from the original credit card: Auth Service Code must match Original Service Code. Pay methods are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY). Numeric, 2 positions; required.
Card Number	The credit card number the customer used on the order. Information will be provided by Oracle at a later date. Alphanumeric, 20 positions; required.
Expiration date	The date the credit card is no longer active. The Require expiration date flag for the pay type controls whether an expiration date is required. For example, a stored value card credit card type typically does not require an expiration date. See Types of Credit Cards for more information. Numeric, 4 positions (MMYY format); required or optional.

Field	Description
Issue #	An incremental issue number, assigned by some banks when they replace a card because it is lost or stolen. Debit cards might require a start date, an issue number, both, or neither. The Require issue # flag for the pay type controls whether an issue number is required or optional. It is important to enter the issue number exactly as it appears on the card. For example, an issue number of 1 is different from an issue number of 01; also, an issue number of 0 is different from a blank issue number. Each bank has its own requirements and conventions regarding issue number. If an issue number is required but not entered in order entry or order maintenance, the system displays an error message: <pre>Credit card issue# () is not valid.</pre>
	 Note: An entry of 00 (two zeros) is not considered a valid issue number.
Start date	Alphanumeric, 2 positions; required or optional. The first date when the card is effective. The Require start date flag for the pay type controls whether the start date is required or optional. You might use a start date for a debit card to indicate the first date when the card is effective. If a start date is required but not entered, the system displays an error message in order entry or maintenance: <pre>Credit card start date (0) is not valid.</pre> • Even if you require a start date for a pay type, the system does not validate the credit card based on whether the start date is before or after the current date. Typically, if your authorization service requires a start date for this pay type, the service would validate the start date provided against the current date. • Debit cards might require a start date, an issue number, both, or neither. Even if a start date or an issue date are not required, you can still enter this information in order entry if it is available.
Authorization #	Numeric, 4 positions; required or optional. The number used to authorize the credit card payment. The original authorization number from pick slip generation is retained and displays for a payment plan order, even after you receive a full authorization for the deposit. Numeric, 16 positions; optional.
Authorization date	The date you manually authorize a payment method, or the date the payment method receives an authorization from the authorization service. Numeric, 6 positions (in user date format); optional.

Display Invoice Pay Method Screen (Reviewing Deposit Information)

Purpose: Use this screen to review:

- deposit information, such as the total amount to deposit, the amount already deposited and the amount remaining to deposit

- the deposit release date, installment information or credit card information
- the prepaid check or cash payment

How to display this screen: Select *Display* for an invoice payment method at the [Invoice Pay Summary Screen](#).

Field descriptions: See [Change Invoice Pay Method Screen](#) for a description of the other fields on this screen.

Field	Description
Installment (Installment amount)	The amount due for the next installment. This field displays only for invoice payment methods associated with an installment payment plan. Numeric, 20 positions with a 2-place decimal; display-only.
Schedule (Installment scheduled date)	The deposit date for the next installment. This date indicates when the invoice is eligible for deposit. If this date is equal to or prior to the current date, the invoice payment is eligible for deposit. The system updates this field when a deposit is confirmed with the next deposit date if there is a remaining amount to deposit. The system updates this field to 99/99/99 when a deposit amount is rejected. This field displays only for invoice payment methods associated with an installment payment plan. Numeric, 6 positions (in user date format); display-only.

Display Deposit History Screen

Purpose: Use this screen to review invoice deposit attempts and responses.

How to display this screen: Select *Deposit History* for an invoice payment method at the [Invoice Pay Summary Screen](#) or the [Display Order Payment Methods Screen](#).

Field	Description
Order #	A number the system assigns to uniquely identify an order. Numeric, 8 positions; display-only.
Pay type	Represents the method of payment on the order. Pay methods are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY) . Numeric, 2 positions; display-only.

Field	Description
Issue #	An incremental issue number, assigned by some banks when they replace a card because it is lost or stolen. Debit cards might require a start date, an issue number, both, or neither. The Require issue # flag for the pay type controls whether an issue number is required or optional. It is important to enter the issue number exactly as it appears on the card. For example, an issue number of <i>1</i> is different from an issue number of <i>01</i>; also, an issue number of <i>0</i> is different from a blank issue number. Each bank has its own requirements and conventions regarding issue number. If an issue number is required but not entered in order entry or order maintenance, the system displays an error message: <pre>Credit card issue# () is not valid.</pre>
	 Note: Debit cards might require a start date, an issue number, both, or neither. Even if a start date or an issue date are not required, you can still enter this information in order entry if it is available.
Start date	Alphanumeric, 2 positions; display-only. The first date when the card is effective. The Require start date flag for the pay type controls whether the start date is required or optional. You might use a start date for a debit card to indicate the first date when the card is effective.
Card Number	Numeric, 4 positions; display-only. The credit card number the customer used on the order. Information will be provided by Oracle at a later date.
Exp date	Alphanumeric, 20 positions; display-only. The date the credit card is no longer active. The expiration date may be zero, depending on the setting of the Require expiration date flag for the pay type. For example, a stored value card credit card type typically does not require an expiration date. See Types of Credit Cards for more information. You can change the expiration date on the Change Credit Card window. See Changing Credit Card Information for an Invoice Payment Method.
Invoice #	Numeric, 4 positions (MMYY format); display-only. The number the system assigns to a customer's bill or credit. The system generates an invoice during billing.
Type (Transaction type)	Numeric, 7 positions; display-only. Indicates the type of deposit. Valid values are: • <i>*PURCH</i> = Purchase deposit, indicating a debit. • <i>*RETURN</i> = Return deposit, indicating a credit. Alphanumeric, 10 positions; display-only.

Field	Description
Date (Deposit created date)	The date when this deposit history record was created. This is the date when the invoice pay method was deposited. The deposit created date ensures that the deposit is not sent again. Numeric, 6 positions (in user date format); display-only.
Amount (Deposit amount)	The amount deposited. The system uses this calculation to determine the amount to deposit: <i>For deferred payment plans:</i> prepaid amount - adjustment amount - total amount deposited to date = deposit amount <i>For installment payment plans:</i> prepaid amount - adjustment amount - total amount deposited to date / intervals remaining = deposit amount Numeric, 20 positions with a 2-place decimal; display-only.
Status (Deposit status)	The status of this deposit: • <i>Confirmed</i> = The service bureau confirmed the deposit. • <i>Deleted</i> = The user deleted a rejected deposit. • <i>Forced</i> = The deposit was rejected, but was forced through deposit (the Forced deposit field for the authorization service is <i>selected</i>). • <i>Manual Confirmed</i> = The user manually confirmed the deposit through Submit Rejected Deposits. • <i>Prepaid</i> = The user entered a prepaid adjustment amount. • <i>Resubmitted</i> = The deposit was resubmitted for deposit. • <i>Sent</i> = The deposit is in the process of being sent to the service bureau. • <i>Unconfirmed</i> = The deposit is unconfirmed by the service bureau. • <i>Written Off</i> = The user wrote off a rejected deposit. • blank = The deposit has not yet been sent to the service bureau. Display-only.
Response (Vendor response code)	A code assigned by the authorization service that identifies whether the credit card deposit was authorized and approved or declined, and the reason for the authorization decline. Vendor response codes are defined in and validated against the Authorization Service Vendor Response table. See Defining Vendor Response Codes. Alphanumeric, 10 positions; display-only.
Bill mthd (Flexible payment bill method)	A code that identifies whether this deposit is related to a deferred or installment payment plan. Valid values: • blank = This is a regular deposit; no payment plans are associated with this deposit. • <i>D</i> = This is a deferred billing deposit. • <i>I</i> = This is an installment billing deposit. The system uses this code to sort deposit records. Alphanumeric, 1 position; display-only.

Screen Option	Procedure
Display deposit history detail	Select <i>Details</i> for a deposit to advance to the Display Deposit History Detail Screen .

Display Deposit History Detail Screen

Purpose: Use this screen to review the deposit history details, such as the action code and the deposit service associated with this deposit. Additional information will be provided by Oracle at a later date.

How to display this screen: Select *Details* for a deposit at the [Display Deposit History Screen](#).

Field	Description
Order #	A number the system assigns to uniquely identify an order. Numeric, 8 positions; display-only.
Invoice #	The number the system assigns to a customer's bill or credit. Numeric, 7 positions; display-only.
Merchant ID (Merchant identification code)	The account number assigned by the service bureau to identify transmissions to and from your company. Alphanumeric, 20 positions; display-only.
Issue #	An incremental issue number, assigned by some banks when they replace a card because it is lost or stolen. Debit cards might require a start date, an issue number, both, or neither. The Require issue # flag for the pay type controls whether an issue number is required or optional. It is important to enter the issue number exactly as it appears on the card. For example, an issue number of <i>1</i> is different from an issue number of <i>01</i>; also, an issue number of <i>0</i> is different from a blank issue number. Each bank has its own requirements and conventions regarding issue number. If an issue number is required but not entered in order entry or order maintenance, the system displays an error message: Credit card issue# () is not valid.
Start date	Alphanumeric, 2 positions; display-only. The first date when the card is effective. The Require start date flag for the pay type controls whether the start date is required or optional. You might use a start date for a debit card to indicate the first date when the card is effective. Numeric, 4 positions; display-only.

 Note:

Debit cards might require a start date, an issue number, both, or neither. Even if a start date or an issue date are not required, you can still enter this information in order entry if it is available.

Field	Description
Card Number	The credit card number sent to be deposited. Additional information will be provided by Oracle at a later date. You can change the credit card number on the Change Credit Card window. See Changing Credit Card Information for an Invoice Payment Method. Alphanumeric, 20 positions; display-only.
Exp date	The date the credit card is no longer active. The expiration date may be zero, depending on the setting of the Require expiration date flag for the pay type. For example, a stored value card credit card type typically does not require an expiration date. See Types of Credit Cards for more information. You can change the expiration date on the Change Credit Card window. See Changing Credit Card Information for an Invoice Payment Method. Numeric, 4 positions (MMYY format); display-only.
Deposit amount (Deposit amount)	The amount deposited or the amount sent to be deposited. The system uses this calculation to determine the amount to deposit: <i>For deferred payment plans:</i> prepaid amount - adjustment amount - total amount deposited to date = deposit amount <i>For installment payment plans:</i> prepaid amount - adjustment amount - total amount deposited to date / intervals remaining = deposit amount Numeric, 20 positions with a 2-place decimal; display-only.
Deposit date (Deposit created date)	The date when this deposit history was created. This is the date when the invoice pay method was deposited. The deposit created date ensures that the deposit is not sent again. Numeric, 6 positions (in user date format); display-only.
Transaction type (Transaction type)	Indicates the type of deposit. Valid values are: • *PURCH = Purchase deposit • *RETURN = Return deposit Alphanumeric, 10 positions; display-only.
Response code (Vendor response code)	A code assigned by the authorization service that identifies whether the credit card deposit was authorized and approved or declined, and the reason for the authorization decline. Vendor response code are defined in and validated against the Authorization Service Vendor Response table. See Defining Vendor Response Codes.

 Note:

In order to see the full vendor response code description, a [Description](#) must be defined for the response code on the [Work with Vendor Response Screen](#).

Alphanumeric, 10 positions; display-only.

Field	Description
Action code	A code set to the deposit service indicating the action to take for reauthorization. Valid values are: • <i>Authorize and Deposit</i> = The deposit requires an authorization before it can be processed. The system sends a code of <i>B</i> (Authorize and Deposit) for: • all payment plan deposits except for the first deposit of an installment plan, when a code of <i>D</i> is sent. • any regular (non-pay plan) deposit whose authorization has expired. You can review the authorization expiration date at the Authorization History Details Window. Additionally, the system updates the Authorization History record with the new authorization number. • <i>Deposit</i> = The deposit does not require authorization and can be processed. The system sends a code of <i>D</i> for all regular deposits, assuming there is an authorization number in the Invoice Pay Method table and the authorization has not expired. If there is no authorization number, the system sends a code of <i>B</i> (Authorize and Deposit). Alphanumeric, 1 position; display-only.
Authorization code	The authorization code sent with this deposit. This code indicates that the amount to charge for this credit card has been authorized manually or through a credit card authorization service. Alphanumeric, 16 positions; display-only.
Billing method (Flexible payment bill method)	A code that identifies whether this deposit is related to a deferred or installment payment plan. Valid values: • <i>blank</i> = This is a regular deposit; no payment plans are associated with this deposit. • <i>Deferred</i> = This is a deferred billing deposit. • <i>Installment</i> = This is an installment billing deposit. The system uses this code to sort deposit records. Display-only.
Deposit service	A code for the service bureau that performs credit card deposits for this pay type. Alphanumeric, 3 positions; display-only.

Field	Description
Deposit status	The status of this deposit. Valid values are: • <i>Confirmed</i> = The service bureau confirmed the deposit. • <i>Deleted</i> = The user deleted a rejected deposit. • <i>Forced</i> = The deposit was rejected, but was forced through deposit (the Forced deposit field for the authorization service is <i>selected</i>). • <i>Manual Confirmed</i> = The user manually confirmed the deposit through Submit Rejected Deposits. • <i>Prepaid</i> = The user entered a prepaid adjustment amount. • <i>Resubmitted</i> = The deposit was resubmitted for deposit. • <i>Sent</i> = The deposit is in the process of being sent to the service bureau. • <i>Unconfirmed</i> = The deposit is unconfirmed by the service bureau. • <i>Written Off</i> = The user wrote off a rejected deposit. • blank = The deposit has not yet been sent to the service bureau. Display-only.

Display Order Payment History Screen

Purpose: Use this screen to review messages written by the system describing changes in payment and invoice activity for the order. The system records all activity associated with the order payment method or invoice payment method defined for the order on this screen, such as:

- deposits made
- invoices netted against each other
- changes made by users
- deactivation of a pay type
- adding, changing, or deleting the payment plan associated with the payment type on the order

Additional information will be provided by Oracle at a later date.

How to display this screen: Select *Payment History* for a payment at the [Invoice Pay Summary Screen](#) or the [Display Order Payment Methods Screen](#).

Field	Description
Order #	A number the system assigns to uniquely identify an order. Numeric, 8 positions; display-only.
Invoice #	The number the system assigns to a customer's bill or credit. This is the invoice number associated with an invoice payment method that has been updated. Numeric, 7 positions; display-only.
Pay type	The code and description of the pay type assigned to this order. Pay type codes are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY). Pay type code: numeric, 2 positions; display-only. Pay type description: alphanumeric, 30 position; display-only.

Field	Description
Date	The date when the transaction occurred. Numeric, 6 positions (in user date format); display-only.
Typ (Transaction type)	Indicates the type of transaction that occurred. Valid values are: • A = Card number has been changed. You can change the credit card number at the Change Invoice Pay Method Screen or the Enter Credit Card Pop-Up window. • B = billing • C = credit check • D = deposit • M = maintenance • N = net Alphanumeric, 1 position; display-only.
Note (Transaction note)	A system-generated description of the transaction. Alphanumeric, 40 positions; display-only.
Invoice	The invoice number associated with an updated invoice payment method. Numeric, 7 positions; display-only.
User	The user ID of the operator responsible for the transaction. Alphanumeric, 10 positions; display-only.

Screen Option	Description
Switch views between order and invoice payment history and invoice payment history only	Select <i>Payment History</i> . The system displays order and invoice payment history records or invoice payment history records only. When you review invoice history records only, the system displays a message to the right of the Invoice number field: Invoice Notes Only.

Reviewing Payment Methods

Display Order Payment Methods Screen

Purpose: This screen lists all of the methods of payment used on the order. Payment methods apply across recipients. The screen does not display refunds or balance due pay types.

How to display this screen: Select *Pay Methods* from the [Order Inquiry Header Screen](#) or [Order Inquiry Detail Screen](#).

Field	Description
Order #	A unique number the system assigns to the order. You will not see a ship-to suffix with the order number on this screen because payment methods apply across all recipients. Numeric, 8 positions; display-only.
Sold to	The name of the customer or company who placed the order. Alphanumeric, 41 positions; display-only.

Field	Description
Ship to	The name of the customer or company to receive the order. Alphanumeric, 41 positions; display-only.
Payment method (unlabeled)	Represents the method of payment on an order. Pay types codes are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY) . Numeric, 2 positions; display-only.
Payment method	A description of the pay type, and information such as the credit card number and expiration date, that is associated with the payment type. If you use credit card tokenization, the credit card number may be a token rather than the actual credit card number. Alphanumeric, 30 characters; display-only.
Amount	Three fields that identify the: Amount to charge The total value charged to the payment method. If no value appears, then this payment type serves as a “catch-all,” meaning any amount not assigned to another payment method applies to this one. Amount billed The amount that applies to the payment method that has been billed to the customer. For credit card payments, this is the total amount billed to the credit card. The system updates this amount as soon as the card is billed even before you process deposits. If you are using deferred or installment billing, the total amount to charge the card displays, even if the total amount has not yet been billed.
	 Note: If this is a prepay amount, and part of the prepayment total was applied to a membership program, only the remaining amount appears as the amount to charge or amount billed. For example, if the customer sent a check for \$100.00 and \$80.00 was applied to the membership program, \$20.00 appears here. See Membership Overview.
	Amount credited The amount that has been credited to the payment method in the event of a return, overpayment, cancellation, or sellout. Numeric, 20 positions with a 2-place decimal; display-only.
Chg seq (Charge sequence)	A number that designates the order of use for the payment method, from zero to 99. The catch-all account must have the highest charge sequence. A charge sequence of 99 indicates that the payment method has been deactivated on the order; see Enter Payment Methods Screen in Order Maintenance . Numeric, 2 positions; display-only.

Field	Description
Pay plan (Payment plan code)	A code that identifies the payment plan associated with the payment method on this order. Payment plan codes are defined in and validated against the Flexible Payment Options table. See Working with Flexible Payment Options (WFPO) . Alphanumeric, 6 positions; display-only.
CC Last 4	The last four positions of the credit card number. From the CC Last 4 field in the Order Payment Method table. If you use credit card encryption, the system does not encrypt the value in this field. Alphanumeric, 4 positions; display-only.

Screen Option	Procedure
Review order pay type detail	Select <i>Display Detail</i> to advance to the Display Order Pay Type Screen (1 of 2) .
Review credit authorization history	Select <i>Display authorization history</i> to advance to the Display Authorization History Screen .
Review contributions	This option is not currently implemented.
Display deposit history	Select <i>Display Deposit History</i> to advance to the Display Deposit History Screen .
Display payment history	Select <i>Display payment history</i> to advance to the Display Order Payment History Screen .

Display Order Pay Type Screen (1 of 2)

Purpose: Use this screen to view order pay type detail. This screen displays the specific properties or characteristics that comprise the order payment method you selected.

Additional order pay type information: Select *OK* to advance to the [Display Order Pay Type Screen \(2 of 2\)](#).

How to display this screen: Select *Details* for a payment method at the [Display Order Payment Methods Screen](#).

Field	Description
Order #	A unique number assigned to the order. Numeric, 7 positions; display-only.
Sold to	The sold to customer defined for this order. Last name: Alphanumeric, 25 positions; display-only. First name: Alphanumeric, 15 positions; display-only. Middle initial: Alphanumeric, 1 position; display-only.

Field	Description
Pay type	The pay type code and description associated with this order. Pay type codes are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY). All payment methods including PayPal and wallets are shown. As PayPal orders are created via the CWOOrderIn API and not directly through the user interface, hence these pay types should not be selected here. Order Administration does not support authorization integration with PayPal. Pay type code: Numeric, 2 positions; display-only. Pay type description: Alphanumeric, 30 positions; display-only.
Amount to charge	The total amount that applies as a charge to the payment method shown. If this field is blank, the balance of the charge for the order applies to the payment method. The balance charge occurs after charges to all other pay types on the order have reached their defined limit. Numeric, 20 positions with a 2-place decimal; display-only.
Amount authorized	The amount authorized for the credit card payment. The system updates this field: - when the system creates a pre-generated pick for the order in an <i>H Generated Has Authorization</i> status. This field remains blank: - if the payment is not a pay category 2 <i>credit card</i> pay type. - if a pre-generated pick is not created for the order. - when the system creates a pre-generated pick for the order in a <i>G Generated No Authorization</i> status; in this situation, the system updates this field when you print the pick slip. Numeric, 20 positions with a 2-place decimal; display-only.
Amount billed	The amount that has already been billed against this pay method. For credit card payments, this is the total amount billed to the credit card. The system updates this amount as soon as the card is billed even before you process deposits. If you are using deferred or installment billing, the total amount to charge the card displays, even if the total amount has not yet been billed.

 Note:

If this is a prepay amount, and part of the prepayment total was applied to a membership program, only the remaining amount appears as the amount to charge or amount billed. For example, if the customer sent a check for \$100.00 and \$80.00 was applied to the membership program, \$20.00 appears here. See [Membership Overview](#).

Numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
Amount collected	The amount you have received from the customer. An amount is collected when: - A shipment is billed using a credit card payment type (Note: This field is updated before you process deposits, and the update occurs regardless of whether the credit card uses a deferred or installment payment plan or is set up for immediate deposit) - Cash amount is entered for a prepaid order Check and cash amounts are collected immediately, while credit card amount will not be visible until billing occurs. For credit card payments, the system updates this amount as soon as the card is billed even before you process deposits. If you are using deferred or installment billing, the total amount to charge the card displays, even if the total amount has not yet been collected.
	 Note: If this is a prepay amount, and part of the prepayment total was applied to a membership program, only the remaining amount appears as the amount to charge or amount billed. For example, if the customer sent a check for \$100.00 and \$80.00 was applied to the membership program, \$20.00 appears here. See Membership Overview.
Amount credited	Numeric, 20 positions with a 2-place decimal; display-only. The amount from this payment type that the customer has received as credit or refund, represented by the creation of a refund in the Refund table. This information is updated when the refund is processed or the refund check is cut.
Charge sequence	Numeric, 20 positions with a 2-place decimal; display-only. A number that designates the order in which a payment method is used.
Cash applied date	Numeric, 1 position; display-only. The month, day, and year you applied a cash (prepaid) payment to the order.
Routing # (Routing number)	Numeric, 6 positions; display-only. Informational.
Acct # (Checking account number)	Alphanumeric, 9 positions; display-only. Informational.
Check # (Check number)	Alphanumeric, 20 positions; display-only. Informational.
Check download date (Check interface download date)	Numeric, 6 positions; display-only. Not implemented.
Card Number	Numeric, 6 positions (in user date format); display-only. Information will be provided by Oracle at a later date.
	Alphanumeric, 20 positions; display-only.

Field	Description
Authorization date	The month, day, and year that your credit card authorization service confirmed or authorized the customer's credit card for the order, or you manually authorized the credit card. Numeric, 6 positions; display-only.
Expiration date	The date the credit card is no longer active. Information will be provided by Oracle at a later date. Numeric, 4 positions (MMYY format); display-only.
Card Last 4	The last four positions of the credit card number. From the CC Last 4 field in the Order Payment Method table. If you use credit card encryption, the system does not encrypt the value in this field. Alphanumeric, 4 positions; display-only.
Authorization number	The number you used when you manually authorized the credit card, or the authorization service assigned when authorizing the credit card. The number can be overridden for manual or authorization service updates, and clears when the order is purged. For orders using a payment plan, the system retains the original authorization number from pick slip generation, even after you receive a full authorization for deposit. Alphanumeric, 16 positions; display-only.
Authorization amount	The amount for this payment method that your authorization service has approved. This field is updated by the Auto Authorization function, and clears when the order is purged. Numeric, 20 positions with a 2-place decimal; display-only.
Issuing bank	The description of the bank issuing the credit card. This field is not currently implemented. Alphanumeric, 10 positions; display-only.
Issue #	An incremental issue number, assigned by some banks when they replace a card because it is lost or stolen. Debit cards might require a start date, an issue number, both, or neither. The Require issue # flag for the pay type controls whether an issue number is required or optional. Alphanumeric, 2 positions; display-only.
Start date	The first date when the card is effective. The Require start date flag for the pay type controls whether the start date is required or optional. You might use a start date for a debit card to indicate the first date when the card is effective. Numeric, 4 positions; display-only.
Hold reason	Represents why the pay type is on hold. Pay type holds include: • <i>PT</i> = Pay Type hold is a hold reason code that the system displays when the order is on pay type hold and no other hold exists. • Prepaid order holds: • <i>TM</i> = Time hold. The system assigns this hold when you specify a check hold time period in the Pay Type table. The hold remains in effect until the time period lapses or you manually release the hold through the Release Held Orders program, whichever occurs first. • <i>KF</i> = Check fraud. A hold that the system assigns when the micra number on a check meets a fraud condition that you defined in the Miscellaneous Fraud table.

Field	Description
	<i>BD</i> = Balance due. A hold that refers to an outstanding balance or amount unpaid that exceeds an amount limit or percentage you established in the Pay Type table. This hold applies when the only pay type on the order is cash. Credit card holds: <i>AV</i> = AVS hold. A credit card pay type hold that the system assigns when the credit card fails address verification. <i>CF</i> = Credit card fraud. A credit card pay type hold that applies when you have entered the credit card number in the Miscellaneous Fraud <i>PV</i> = Pay Plan Velocity Hold. A hold that the system assigns when a credit card has been used too many times within a specified period for an order containing a deferred or installment payment plan. <i>P\$</i> = Pay Plan Dollar Threshold. A hold that the system assigns when the total amount and invoice amount outstanding for a sold to customer on orders containing a deferred or installment payment plan exceeds the Dollar Threshold for Sold To Customer Orders with Flexible Payments (F54) system control value. <i>W</i> = Waiting for credit authorization. A hold that applies to an order waiting for authorization from a credit checking service bureau from the Pay Type table. CW hold will not prevent the order from processing. See Releasing Held Orders. <i>User-defined holds:</i> A user-defined hold reason displays here if, for example, the pay type was declined by the authorization service and you associated the vendor response with a unique pay type hold reason. See the Hold date field. Alphanumeric, 2 positions; display-only.
Hold until	The date when the order is eligible for release through the Release Orders on Time Hold Periodic Function. You can assign a number of days for the system to add when calculating the hold date to each response code you receive from an authorization service. See Defining Vendor Response Codes for more information on setting up vendor responses for authorization services, and releasing orders from time hold. Numeric, 6 positions (in user date format); display-only.

Display Order Pay Type Screen (2 of 2)

Purpose: Use this screen to review order pay type detail related to deferred or installment pay plans.

How to display this screen: Select *OK* at the [Display Order Pay Type Screen \(1 of 2\)](#).

Field	Description
Order #	A unique number assigned to the order. Numeric, 7 positions; display-only.
Sold to	The sold to customer defined for this order. Last name: Alphanumeric, 25 positions; display-only. First name: Alphanumeric, 15 positions; display-only. Middle initial: Alphanumeric, 1 position; display-only.

Field	Description
Pay type	The pay type code and description associated with this order. Pay type codes are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY). Pay type code: Numeric, 2 positions; display-only. Pay type description: Alphanumeric, 30 positions; display-only.
Pay plan code	The payment plan code and description associated with the pay type on this order. Payment plan codes are defined in and validated against the Flexible Payment Options table. See Working with Flexible Payment Options (WFPO). Pay plan code: Alphanumeric, 5 positions; display-only. Pay plan description: Alphanumeric, 40 positions; display-only.
Suppress deposit	Indicates whether the system will include this invoice payment method when you run Processing Auto Deposits (SDEP). Valid values are: • <i>Selected</i> = The system will not attempt to deposit this payment method. • <i>Unselected</i> = This payment method will be included when you process deposits. The system determines how to set this flag based on the setting of the Suppress deposit flag at the Display Order Pay Type Screen (1 of 2). This field can be <i>selected</i> if: • you create the order through the <i>Generic Order Interface (Order API)</i>; see <i>Suppressing Deposits and Refunds</i> in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) for an overview. • this is a ship-for-pickup order, and the Payment at POS for Ship for Pickup Orders (L60) system control value is selected. See that system control value for background. For more information see Only credit card payment methods can have this flag <i>selected</i>. This flag is <i>selected</i> only for the first time that you bill against the payment method; afterward, the system resets the flag for the payment method to <i>Unselected</i>. Once you bill this payment method, the system resets this flag to <i>Unselected</i>.

Field	Description
Suppress refund	Indicates whether the system will ever generate a refund for this payment method. Valid values are: <i>selected</i> = The system will never generate a refund to the customer for this payment method; instead, any refund will be created in a cancel pending status, and canceled when you process refunds. In addition, if the return disposition code assigned to the return matches the return disposition code defined in the Return Disposition Code to Exclude in ORCE Sales Feed (M22) system control value, the system excludes the return (credit) invoice from the Customer Engagement Sales Feed and does not generate a return confirmation for the return. <i>unselected</i> = Refunds will be created if appropriate based on normal processing. This flag can be <i>selected</i> if: - you create the order through the <i>Generic Order Interface (Order API)</i>; see <i>Suppressing Deposits and Refunds</i> for an overview. - this is a ship-for-pickup order, and the Payment at POS for Ship for Pickup Orders (L60) system control value is selected. See that system control value for background. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Additionally, this flag can be changed when you create a return through the <i>Inbound Return API</i>; see <i>Suppressing Refunds</i> in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) for an overview for an overview.
# days for deferral	The number of days the payment is deferred. This field is used with deferred payment plans only. Numeric, 3 positions; display-only.
Fix date for deferral	The day of the month when payment for this order is due. This field is used with deferred payment plans only. Numeric, 6 positions (in user date format); display-only.
# of installments	The number of installments for this order. This field is used with installment payment plans only. Numeric, 2 positions; display-only.
Installment interval	The amount of days between each installment. This field is used with installment payment plans only. Numeric, 3 positions; display-only.
Fixed installment date	The day of the month when each installment is due. This field is used with installment payment plans only. Numeric, 6 positions (in user date format); display-only.
Expiration date	The date when this payment plan expires. Numeric, 6 positions (in user date format); display-only.

Display Authorization History Screen

Purpose: Use this screen to review the authorization transactions that occurred for the customer's credit card.

Creating authorization history for orders authorized on the web: Order Administration creates an authorization history record with a status of *A Approved* for an order that received

an approved credit card authorization on the web storefront if an *auth_number* and *auth_amount* are defined for the credit card payment.

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

How to display this screen: Select *Display authorization history* for a payment method at the [Display Order Payment Methods Screen](#).

For more information: See [Display Order Payment Methods Screen](#) for a description of the fields at the top of this screen.

Field	Description
Currency code	The currency of the Authorization amount and Deposit amount. Displayed only if you use the <i>Alternate Currency</i> option to toggle between displaying the Authorization amount and Deposit amount in the local currency and alternate currency. This option is available only if the Multi Currency by Offer (E03) system control value is <i>selected</i> . Alphanumeric, 3 positions; display-only.
Sts (Status)	The status of the authorization as updated by the system. Valid values are: • blank = Not sent yet • S = Sent, but not received • A = Authorized • D = Declined • E = Expired; updated to this status by Pick Slip Generation only • O = Authorized, but not used • M = Mismatch Auth/Deposit (created for authorizations during deposits) Alphanumeric, 1 position; display-only.
Auth amt (Authorized amount)	The amount the service bureau authorized to be charged on the credit card. You can toggle between viewing the authorization amount in the local currency and the alternate currency by selecting <i>Alternate Currency</i> if the Multi Currency by Offer (E03) system control value is <i>selected</i> and the order is associated with an alternate currency. Numeric, 20 positions with a 2-place decimal; display-only.
Auth# (Authorization number)	A number for the authorization transaction assigned by the authorization service. Alphanumeric, 16 positions; display-only.
Auth date (Authorization date)	The date the authorization service approved the amount to be charged. Numeric, 6 positions (in user date format); display-only.
Send date	The date you transmitted the authorization to the authorization service. Numeric, 6 positions; display-only.
Deposit amt (Deposit amount)	The amount deposited to the bank for the charge. You can toggle between viewing the deposit amount in the local currency and the alternate currency by selecting <i>Alternate Currency</i> if the Multi Currency by Offer (E03) system control value is <i>selected</i> and the order is associated with an alternate currency. Numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
Response 1	A code representing the response of the authorization service. The vendor response code is from the Vendor response 1 field in the Authorization History table. Alphanumeric, 10 positions; display-only.

Screen Option	Procedure
Display details	Select <i>Details</i> for an authorization to advance to the Authorization History Details Window .
Work with card authorization reversals	Select <i>Auth Reversals</i> for a pay category 2 <i>Credit Card</i> payment method to advance to the Display Authorization Reversals Screen .

**Note:**

For all other payment methods, the screen displays an error message: Option not valid for this pay type.

Toggle between displaying the Authorization amount and Deposit amount in the local currency and the alternate currency

Select *Alternate Currency*. The system toggles the Authorization amount and Deposit amount between the local currency and alternate currency. Additionally, when viewing the amounts in the alternate currency, the Currency code field displays in the upper right corner of the screen indicating the currency of the alternate amounts. This option is available only if the [Multi Currency by Offer \(E03\)](#) system control value is *selected*.

Authorization History Details Window

Purpose: Use this pop-up window to review the history of an authorization, such as the vendor response code and when the authorization was submitted and deposited.

How to display this screen: Select *Details* for an authorization at the [Display Authorization History Screen](#).

Field	Description
Vendor response	A code representing the response of the authorization service. See Defining Vendor Response Codes for more information on vendor responses. Alphanumeric, 10 positions; display-only.
Vendor response description (unlabeled field)	The description of the vendor response code. Alphanumeric, two 30-position fields; display-only.

Field	Description
Vendor response 2	A code representing the credit card security response (CID, CVV2, CVC2) for the credit card authorization. If a card security value and card security presence were not provided for the credit card, this field is blank. The card security response code is from the Vendor response 2 field in the Authorization History table. Alphanumeric, 10 positions; display-only.
Vendor response 2 description (unlabeled field)	The description of the vendor response code used for card security identification. Alphanumeric, two 30-position fields; display-only.
AVS response	A code representing the address verification response for the credit card authorization if AVS is used. If AVS is not used, this field is blank. The AVS response code is from the AVS response field in the Authorization History table. Alphanumeric, 10 positions; display-only.
AVS response description (unlabeled field)	The description of the AVS response code. Alphanumeric, two 40-position fields; display-only.
Auth # (Authorization number)	A number assigned by the authorization service for the authorization transaction. Alphanumeric, 16 positions; display-only.
Status (unlabeled field to the right of the Auth #)	A description of the status of the authorization as updated by the system. Possible statuses are: • Sent for authorization • Authorized • Not yet sent • Declined • Expired • Authorized but not used • Mismatch Auth/Deposit (created for authorizations during deposits) • Voided
Auth date (Authorization date)	The date the authorization service approved the amount to be charged. Numeric, 6 positions (in user date format); display-only.
Auth expires (Authorization expires)	The date the authorization expires. The system uses the following calculation to determine if an authorization has expired: <code>authorization date (from Authorization History table) + reauthorization days (from Pay Type table) = authorization expiration date.</code> Numeric, 6 positions (in user date format); display-only.
Auth time Authorization time	The time when the credit card payment was authorized. The system uses this time to determine if the authorization is eligible for reversal. Also, this information is used through the REAUTH process. Information will be provided by Oracle at a later date. Numeric, 6 positions (HH:MM:SS format); display-only.

Field	Description
Amount submitted	The amount submitted for authorization and approved by the credit card authorization service. You can toggle between viewing the amount submitted in the local currency and the alternate currency by selecting <i>Alt Currency</i> if the Multi Currency by Offer (E03) system control value is <i>selected</i> and the order is associated with an alternate currency. Numeric, 20 positions with a 2-place decimal; display-only.
Amount available	The amount remaining that requires authorization. You can toggle between viewing the amount available in the local currency and the alternate currency by selecting <i>Alt Currency</i> if the Multi Currency by Offer (E03) system control value is <i>selected</i> and the order is associated with an alternate currency. Numeric, 20 positions with a 2-place decimal; display-only.
Amount deposited	The total amount deposited. You can toggle between viewing the amount available in the local currency and the alternate currency by selecting <i>Alt Currency</i> if the Multi Currency by Offer (E03) system control value is <i>selected</i> and the order is associated with an alternate currency. Numeric, 20 positions with a 2-place decimal; display-only.
Auth request ID	The transaction ID, or reference number, associated with the authorization transaction for the credit card payment. Alphanumeric, 40 positions; display-only.

Screen Option	Procedure
Toggle between displaying the Amount submitted, Amount available, and the Amount deposited in the local currency and the alternate currency	Select <i>Alt Currency</i> . The system toggles the Amount submitted, Amount available, and the Amount deposited between the local currency and alternate currency. Additionally, when viewing the amounts in the alternate currency, the Currency code field displays in the upper right corner of the screen indicating the currency of the alternate amounts.

Display Authorization Reversals Screen

Purpose: Use this screen to review authorization reversals applied against a card payment.

This screen is helpful in determining if the authorization reversal was approved or declined:

- Approved authorization reversals have a Response and Approval date and time.
- Declined authorization reversals have a Response, but a blank Approval date and time.

The system processes an authorization reversal against a card payment when a cancellation amount is applied against the card or the card is deactivated and an open, unused authorization amount exists. Authorization reversals allow you to reimburse the card the amount that was initially charged against the card so the customer can use the amount to pay for future purchases. Information will be provided by Oracle at a later date.

 Note:

- This screen is available for stored value card and credit card payment methods only.
 - Stored value card payments have a Pay category of Credit Card and a Card type of Stored Value.
 - Credit card payments have a Pay category of Credit Card and a Card type of Credit.

If you try to advance to this screen for any other pay type, an error message indicates: Option not valid for this pay type.

How to display this screen: Select *Auth Reversals* for an authorization history record related to a stored value card or credit card at the [Display Authorization History Screen](#).

Field	Description
Order #	The order number containing the card payment method. Numeric, 8 positions; display-only.
Pay type	A description of the card payment method. Alphanumeric, 30 positions; display-only.
Card Number	The number assigned to the card payment method. <i>Masking:</i> This number displays in the format specified at the Card Number Layout Screen for the associated pay type. For example, *****1443 may display instead of the entire number. See Card Number Format for an overview. Alphanumeric, 20 positions; display-only.
Exp date	The date when the card expires. Numeric, 4 positions (MMDD format); display-only.
Seq #	The authorization history sequence number associated with the card authorization reversal. Numeric, 3 positions; display-only.
Auth amount	The original authorization amount applied against the card. Numeric, 20 positions with a 2-place decimal; display-only.
Auth date	The date the card was originally authorized. Numeric, 6 positions (in user date format); display-only.
Create date	The date the authorization reversal was created against the card payment. This is the date when a cancellation was processed against the card payment or when the card was deactivated. Numeric, 6 positions (in user date format); display-only.
Create time	The time the authorization reversal was created against the card payment. Numeric, 6 positions (HH:MM:SS format); display-only.
Approval date	The date when the authorization reversal was approved by the service bureau. Numeric, 6 positions (in user date format); display-only.

Field	Description
Approval time	The time when the authorization reversal was approved by the service bureau. Numeric, 6 positions (HH:MM:SS format); display-only.
Reversal amount	The authorization amount to reimburse to the card. Numeric, 20 positions with a 2-place decimal; display-only.
Response	The response received from the service bureau, indicating if the authorization reversal was approved or declined.

 **Note:**

The response received from the service bureau does not display in this field unless it is set up as a vendor response for the service bureau in Work with Authorization Services (WASV).

Alphanumeric, 40 positions; display-only.

Screen Option	Procedure
Toggle between displaying the Authorization amount and Reversal amount in the local currency and the alternate currency	Select <i>Toggle Alternate Currency</i> . The system toggles the Authorization amount and Reversal amount between the local currency and alternate currency. Additionally, when viewing the amounts in the alternate currency, the Currency code field displays in the upper right corner of the screen indicating the currency of the alternate amounts.

Display Additional Charges Screen

Purpose: Use this screen to review the miscellaneous charges and credits that were added to the order through Order Entry or Order Maintenance.

How to display this screen: Select *Charges* at the [Order Inquiry Header Screen](#) or the [Order Inquiry Detail Screen](#).

Field	Description
Order #	The number assigned by the system to identify this order. Numeric, 8 positions; display-only, assigned by the system.
Ship to number (Unlabeled field to the right of the Order number field)	A number to identify the shipping address on the order. Numeric, 3 positions; display-only, assigned by the system.
Sold to (Sold-to customer name)	The name of the sold-to customer. Alphanumeric, 40 positions; display-only.
Ship to (Ship-to customer name)	The name of the ship-to customer. Alphanumeric, 40 positions; display-only.

Field	Description
Code	A value that represents the additional charges code. Additional charges are defined in and validated against the Additional Charge Code table. See Establishing Additional Charge Codes (WADC). Alphanumeric, 2 positions; display-only.
Description	The description of the additional charge code. Alphanumeric, 30 positions; display-only.
Amount	The amount of the additional charge. A negative amount identifies an additional charge credit. Additional charges are billed through the billing function. You can limit the total amount of negative additional charges applied to an order by entering a value in the Negative Additional Charge Limit (E49) system control value. You cannot override this value unless you have authority to the Override Negative Additional Charge Limit (A60) secured feature. Numeric, 13 positions with a 2-place decimal; display-only.
Billed	Indicates whether or not the additional charge has been billed yet. If it has been billed, you cannot modify the charge. Values are: • <i>Selected</i> = The additional charge has been billed. • <i>Unselected</i> = The additional charge has not been billed.
Invoice	The number assigned to uniquely identify the invoice. Numeric, 7 positions; display-only.
Inv date (Invoice date)	The date the invoice was billed. Alphanumeric, 6 positions (in user date format); display-only.
Entered by	The user name of the person who entered the additional charge. In the case of a membership order, this is the user ID of the person who submitted the membership generation job through Generating Membership Orders (EGMO). See the <i>entered_by_user</i> field for information on how this field is populated through the order API (e-commerce order). For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Alphanumeric, 12 positions; display-only.
Date	The date the additional charge was entered. Numeric, 6 positions (in user date format); display-only.
System generated	Determines whether the additional charge was generated by the system or was manually entered. Valid values are: • <i>Selected</i> = This additional charge was generated by the system. • <i>Unselected</i> = This additional charge was manually entered.
Maintained by	The user name of the person who made any changes to the additional charge. Alphanumeric, 12 positions; display-only.
Date	The date the additional charge was changed. Numeric, 6 positions (in user date format); display-only.

Display Refunds for Order Screen

Purpose: Use this screen to review refund activity for an order.

How to display this screen: Select *Refunds* at the [Order Inquiry Header Screen](#) or the [Order Inquiry Detail Screen](#).

Field	Description
Pay type	A code that identifies the payment type associated with the refund. Pay types are defined in and validated against the Pay Type table, and must fall into one of the valid pay categories (cash/check or credit card). See Working with Pay Types (WPAY). Numeric, 2 positions; display-only.
Sts (Status)	A code that identifies the current status of the refund. Valid values include: • C = Canceled • H = Held • N = Cancellation pending; the refund will be canceled when refunds are processed • O = Open • P = Processed • T = Written off • W = Write-off pending; the refund will be written off when write-offs are processed Alphanumeric, 1 position; display-only.
Dp (Deposit)	Indicates whether the refund has been deposited. A deferred or installment payment plan can prevent the system from depositing a refund in order to offset the deferred or installment amount. For example, if the order payment amount of 60.00 is deferred for 30 days and the customer receives a refund for 20.00, instead of refunding the customer 20.00, the system subtracts the refund amount from the order payment amount. The customer will then pay 40.00 at the end of the 30 days. Valid values are: • <i>Selected</i> = The refund has been deposited (there is a Deposit created date for the Invoice Payment Method). • <i>Unselected</i> = The refund has not been deposited.
Current category	A code that identifies the current pay category associated with the refund. Valid categories are: • <i>Cash/check</i> • <i>Credit card</i> Display-only.
Original category	A code that identifies the original pay category associated with the refund. Valid categories are: • <i>Cash/check</i> • <i>Credit card</i> Display-only.

Field	Description
Amount	The amount you are refunding to the customer. This is the amount that has actually been deposited. This amount can be different from the amount of the original refund if the credit was netted against a debit deposit. Numeric, 20 positions with a 2-place decimal; display-only.
Date created	The date the refund was generated. Numeric, 6 positions (in user date format); display-only.
Date processed	The date, if any, when the refund was processed, written off, or canceled. If the pay type on the order is a credit card, this date represents the deposit date, and might be either the actual deposit date or the future release date if the deposit has not yet been processed. Numeric, 6 positions (in user date format); display-only.
Man hld (Manual hold)	Indicates whether the amount of the refund exceeds the maximum refund amount specified in the Pay Type or if you placed the refund on hold manually through the Work with Refunds Screen. To issue the refund, you must first release it from hold using the Work with Refunds function. Valid values are: <i>Selected</i> = The refund is on manual hold. <i>Unselected</i> = The refund is not on manual hold.
Hold until (Hold until date)	The date when the refund is eligible for processing. Numeric, 6 positions (in user date format); display-only.

Display Order Summary Screen

Purpose: Use this option to review all items ordered, including items ordered for the current order plus any recipient orders. This screen lists each item ordered for each shipping address so you can verify or confirm the items ordered. You can also use this screen to view the order totals in the customer's currency.

Alternate currency order totals: The screen displays the order totals on this screen in the local currency. You can review the order totals in an alternate currency if the order is associated with an alternate currency.

How to display this screen: Select *Order Totals* at the [Order Inquiry Header Screen](#) or the [Order Inquiry Detail Screen](#).

Field	Description
Order #	The number of the order you are currently working with. Numeric, 9 positions; display-only, assigned by the system.
# Rcp (Number of recipients)	The number of recipients on this order. This is the number of shipping addresses on the order. Numeric, 3 positions; display-only, assigned by the system.
Prepaid	The total amount prepaid on this order using checks. Numeric, 20 positions with a 2-place decimal; display-only, calculated by the system.

Field	Description
Balance	The balance due on the order, calculated by subtracting the order total (current order plus all recipient orders) from the prepaid amount. If the balance is 0, this means that the customer prepaid the entire order. If the balance is negative, there is a balance due that will be charged to the customer. Numeric, 20 positions with a 2-place decimal; display-only, calculated by the system.
Current recip (Current recipient)	The ship-to number indicating the recipient you are currently working with. Numeric, 3 positions; display-only.
Merch (Merchandise)	The total value of merchandise on this order, which is calculated by multiplying the quantity ordered by the item's price. This amount does not include charges for freight (shipping), sales tax (except for hidden tax), or handling. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Frt (Freight)	The total charge for shipping the current order plus any recipient orders. Shipping charges are based on the freight method defined for the source code used on the order. This amount does not include any additional shipping charges. This field is blank if no freight is charged on the order (Calc freight = N). Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Frt+ (Additional freight)	The total additional freight charges on the current order plus any recipient orders. Additional freight charges can be defined for a shipper in the Ship Via table. For example, a shipper can charge a premium for overnight or Federal Express deliveries. See Working with Ship Via Codes (WVIA). Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Chg (Additional charges)	The total extra charges added to the current order and any recipient orders. This can be an additional service charge defined for the source code or offer used on the order, an additional shipping charge for an item on the order, a guaranteed service charge defined for the offer, or any type of miscellaneous charge or credit added to the order. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Tax	The total sales tax on the current order and any recipient orders, based on the merchandise value of the order and, optionally, freight and special handling. This total does not include hidden tax. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Hnd	The total charge, on the current order and any recipient orders, for special handling or gift wrapping. Numeric, 13 positions with a 2-place decimal; display-only, updated by the system.

Field	Description
Total	The grand total of all charges on the current order and any recipient orders. This includes merchandise, freight, additional freight, additional charges, tax, and handling. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Shp (Ship To number)	The number of the shipping address on the order. Numeric, 3 positions; display-only, assigned by the system.
Name	The initial and last name or company name of the customer the order is shipping to. The customer or company name only displays next to the first detail line for each customer. Alphanumeric, 10 positions; display-only.
Ln#	The line number of this item on the order. Numeric, 3 positions; display-only.
Qty (Quantity)	The number of units ordered of the item. Numeric, 5 positions; display-only.
Item	A code for a unit of inventory that you sell. Enter a valid item to display items that match your entry. Alphanumeric, 12 positions; display-only.
SKU	The style of the item, such as its color or size. Alphanumeric, three 4-position fields.
Via	A code for the carrier or service that will deliver the order. Ship via codes are defined in and validated against the Ship Via table. See Working with Ship Via Codes (WVIA) . Numeric, 2 positions; display-only.
Price	The selling price of a single unit of this item. The system calculates the price by taking into account any price breaks, source or order discounts, and using the pricing hierarchy in the System Control table. Numeric, 13 positions with a 2 place decimal; display-only, calculated by the system.
Whs (Warehouse)	A code for the warehouse this item will ship from. Warehouse codes are defined in and validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS) . Numeric, 3 positions; display-only.
SA (Ship alone code)	Identifies whether the item can ship with other items. Valid values are: • S = Ship alone; item cannot be shipped with other items. A pick slip prints for each unit ordered. • M = Multi-ship; item can ship with other items. • L = Picks print in location code sequence. • U = User-defined. This information is taken from the Ship alone field in the Item table. Alphanumeric, 1 position; display-only.
Item description (Unlabeled field below the Shp field)	The description of the item being ordered. Alphanumeric, 120 positions; display-only.

Field	Description
SKU description (Unlabeled field below the SKU field)	The description of the SKU for the item. Alphanumeric, 25 positions; display-only.
Extended price (Unlabeled field below the Whs field)	The total charge for this item, which is calculated by multiplying the price of the item by the quantity ordered. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.

Screen Option	Procedure
Accept the order information for the recipient you are currently working with and switch to another recipient	Select <i>recipient and accept current</i> for a recipient. You can select this option only during order entry. A message displays if you select <i>Select recipient and accept current</i> for a recipient during order maintenance/inquiry: Subfile option (1) is not valid for current processing mode (Display).
Copy an item to the recipient you are currently work with	Select <i>Copy item to current recipient</i> for a recipient. You can select this option only during order entry. A message displays if you Select <i>Copy item to current recipient</i> for a recipient during order maintenance/inquiry: Subfile option (3) is not valid for current processing mode (Display).
Display the order totals at the top of the screen in the customer's currency or in the system currency (from the Local Currency Code (A55) system control value).	Select <i>Foreign Currency</i> . See Displaying Order Totals in Foreign Currency .
Review the items selected to copy	Select <i>Items Selected</i> . You can select this option only during order entry.
Accept the order information for the recipient you are currently working with and advance to the Select Order Recipient screen	Select <i>Accept/Switch Recipient</i> . You can select this option only during order entry.

Displaying Order Totals in Foreign Currency

Purpose: Use this function to convert, then display the order totals in the customer's currency.

Using this feature: Select *Foreign Currency* at the [Display Order Summary Screen](#) to convert the order totals to the customer's currency.

About currency conversion: When you select *Foreign Currency*, the system gets the country code for the sold-to customer (the customer who placed the order), then checks the Currency table (fast path = *WCUR*).

If a currency code has been defined for this country, the system multiplies each order total bucket by the conversion rate, and displays the order totals in the customer's own currency. This way, the order total is more meaningful to the customer.

! Important:

The figures on this screen will not be correct if the [Multi Currency by Offer \(E03\)](#) system control value is *selected*; in this case, the figures displayed at the other standard order inquiry screen, and in order entry and order maintenance, are already in the customer's currency.

Example: The customer calls from Italy to inquire on the charges and items on an order. You select *Order Summary* to review the order totals.

Next, you select *Foreign Currency* to display the totals expressed in the customer's own currency. The system performs the currency conversion immediately, using the current conversion rate from the Currency table, and updates the order totals appropriately.

If no Currency is Defined for the Country

The system issues a message if there is no currency defined for the customer's country in the Currency table, and you will not be able to view the order totals in the customer's currency when you select *System Currency Display*:

No currency match found for country XXX.

- The value in the Total field is the sum of all other order totals fields (Merch, Frt, Frt+, Chg, Tax, and Hnd); no conversion is performed on this field.
- Currency values extending beyond 2 decimal places are rounded up or down to the nearest integer value, such as a dollar value.
- The country code and the currency code must be the same for order totals conversion.
- The order totals are converted using the current currency rate. This means that the order totals you see on this screen may be different from the order totals at shipping time.
- Selecting *System Currency Display* toggles between displaying the order totals in the customer's (foreign) currency or in the system currency.

Reviewing Order-Level Properties

Purpose: In addition to reviewing detailed information, you can use Order Inquiry to review information that pertains to the overall order, including:

- Conditions that affect the order, such as ship complete, gift order, etc.
- History of order transactions
- Messages added to the order during Order Entry, Order Maintenance, or Order Inquiry

For more information: See [Display Order History Screen](#) for a discussion of the *Order History* option that is also available from the Order Inquiry screens, and see [Work with Order Messages Screen](#) for a discussion of working with or reviewing order messages.

Display Order Properties Screen

Purpose: Use this screen to obtain additional information about the order. This screen displays extra fields that do not appear on the header screen. Also, this screen identifies the representative or operator who took the order and the time when the order was accepted on the system.

How to display this screen: Select *Properties* at the [Order Inquiry Header Screen](#) or [Order Inquiry Detail Screen](#).

Field	Description
Batch #	The system-assigned number for a group of orders. Orders you receive through the order API are assigned to the Default Batch for E-Commerce Orders in Error (G41) if they are in error; similarly, retail pickup or delivery orders that are in error are assigned to the Order Broker Error Batch Number (K90). The system removes the batch number when you accept the batch if the order is error-free. Numeric, 5 positions; display-only.
Entered by	The user ID of the person or process who entered the order; otherwise, your default user. Alphanumeric, 10 positions; display-only.
Time	The time of day the order was originally entered. Numeric, 6 positions (HH:MM:SS format); display-only.
Order #	A unique number assigned by the system to identify an order. The order ship-to number is separated from the order number by a hyphen. Order number: numeric, 8 positions; display-only. Ship-to number: numeric, 3 positions; display-only.
Alt ord	The order number, if any, that was passed through the <i>Generic Order Interface (Order API)</i> and used to identify the order in an external system. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). In the case of a retail pickup or delivery order assigned through the Order Orchestration Integration, this is the order number in the system originating the order. If the originating system is Order Administration, the system prefaces the originating order number with the text ORIG#: . For example: ORIG#: 9999-001, where ORIG#: indicates the order originated in Order Administration, 9999 is the original order number in Order Administration, and 001 is the ship to number. See Retail Pickup (including Ship-for-Pickup) or Delivery Orders for more information. Created in order entry: If the Alternate Order Number Prefix for Order Creation (M76) system control value specifies a prefix and the order was created in Classic View or Modern View order entry or through Generate Customer Membership Orders (EGMO), this is the specified prefix followed by the order number. The order number is zero-filled, for example, ABC00000123, where ABC is the prefix code and 123 is the order number. Alphanumeric, 35 positions; display-only.
Sold to name	The name of the customer who placed the order, including the company name, if any. Alphanumeric, 41 positions; display-only.

Field	Description
Mbr ID (Membership ID)	The code identifying the membership program that generated the order. Customers can purchase memberships in order to generate orders for selected items on a periodic basis. Blank if the order was not generated through a membership program. The sequence number to the right of the membership ID uniquely identifies the orders generated for the same customer and membership program at the same time. For example, a customer creates a customer membership to receive coffee at his home address, and another to send coffee to a different recipient, both through the same membership program. When you generate the membership orders, the generation program assigns a sequence number of <i>001</i> to the first order and a sequence number of <i>002</i> to the second order. The sequence number is <i>00</i> if the order was not generated through a membership program. See Membership Overview for background on membership programs, customer memberships, and membership order generation. Mbr ID: alphanumeric, 12 positions; display-only. Sequence number: numeric, 3 positions; display-only.
Ship to name	The name of the customer to receive the order, including the company name, if any. In the case of a retail pickup or ship-for-pickup order, this is the name of the store location where the customer picks up the order; see the Order Orchestration Integration for an overview. Alphanumeric, 41 positions; display-only.
Source code	The source code from the order header. Source codes are unique codes used to identify segments of your customer base or a rented list. Each source code is assigned to one offer and one division. Source codes control the freight and pricing method used on an order. Alphanumeric, 7 positions; display-only.
Weight	The total shipping weight of the items on the order, excluding soldout, cancelled, and returned items. Numeric, 20 positions with a 3-place decimal; display-only.
Gift	If this field is selected, this is a gift order, which means: 1. item prices do not print on the pick slip. 2. the system generates a gift acknowledgment to notify the sold-to customer who placed the order that the order has shipped.
Ship via	A code for the shipper. A different ship via may also exist at the item level. Ship via codes are defined in and validated against the Ship Via table See Working with Ship Via Codes (WVIA). Numeric, 2 positions; display-only.
Ship via description (Unlabeled field to the right of the ship via field)	The description of the shipper. Alphanumeric, 30 positions; display-only.
Arrival date	The date the customer requests to receive the order. The arrival date defaults to the order date, but you can override this default. Numeric, 6 positions (in user date format); display-only.

Field	Description
Order date	The processing date for the order. Defaults to the current date, but you can override it to date-stamp orders you received on an earlier date but did not enter. However, if you change the order date to a date which falls within a closed accounting period, the following error message indicates: Order date falls within the closed accounting period. The order date determines which orders the system reserves first, if using Batch Reservation or running the Evaluate Backorders program. Numeric, 6 positions (in user date format); display-only.
Enter date	The date when the order was created. Numeric, 6 positions (in user date format); display-only.
Ship complete	Determines whether all the items on an order must ship together. Valid values are: <i>Selected</i> = Ship all items on the order in one shipment; delay performing pick slip preparation and printing pick slips until all items are available in the requested quantities. <i>Unselected</i> = (default): Ship the items on the order as soon as they are reserved.
Quote Origin	If this field is selected, the order originated from a pre-order quote. See Entering Pre-Order Quotes for an overview and the required setup.
B/O priority (Backorder priority)	A code that determines the priority for order fulfillment on a backordered item. A value defaults to this field if you entered a priority in the B/O priority (Backorder priority) field for the source code; in this case, the header-level value defaults to the Priority field on the order detail line. Priority codes range from 0-9, where: 0 = Low priority. 9 = High priority. Numeric, 1 position; display-only.
Cancel BO (Cancel backorder)	Identifies whether to automatically cancel items that are unavailable (backordered) with the first shipment on the order. Valid values are: <i>Selected</i> = Cancel backordered items with first shipment. <i>Unselected</i> = (default): Do not cancel backordered items. If this field is <i>selected</i>, any unshipped line on an order is canceled during billing using the Auto Soldout Cancel Reason (C20), provided this system control value specifies a valid cancel reason code.
Freight override	Indicates the amount of a freight override, if you entered an override amount for the order.

**Note:**

If a freight override exists, the system does not apply any additional freight, item charges, weight charges, or service charges to the order.

Numeric, 13 positions with a 2-place decimal; display-only.

Field	Description
Calculate freight	Indicates whether the system will calculate and add freight charges to the order. <i>Selected</i> = Freight will be calculated. <i>Unselected</i> = Freight will not be calculated; the freight method for the source is ignored. To change this setting for the order, use the Calculate freight field at the Work with Order Screen.
Freight tax override	The tax override amount on freight for the order ship to. If defined, the system does not calculate tax on freight. Used only if a freight override amount is defined.
 Note: You can define a tax override amount on freight only on orders received through the <i>Generic Order Interface (Order API)</i>.	
Freight tax rate unlabeled field next to Freight tax override	For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Selected for orders received from Order Orchestration. See Tax on Freight (B14) for a discussion. Numeric, 13 positions with a 2-place decimal; display-only. The tax rate for the freight tax override. The system uses the following calculation to determine the freight tax rate: $(\text{freight override amount} / \text{freight tax override}) \times 100 = \text{freight tax rate}$ <i>Example:</i> If the freight override amount is 6.00 and the freight tax override amount is 3.00, the freight tax rate is 50.00. The system uses the freight tax rate during return and cancellation processing when calculating the amount of tax on freight that should be returned or deducted during cancellation. See Tax on Freight (B14) for a discussion of how the freight tax rate is determined for orders received from Order Orchestration. Numeric, 13 positions with a 2-place decimal; display-only.
Carrier #	The number of the customer's account with the carrier. When a number is present in this field, the customer doesn't pay for shipment of orders via the carrier. Instead, the carrier receives the bill for shipment. Alphanumeric, 10 positions; display-only.
Purchase order	The purchase order number under which the order was placed. From the <code>ref_transaction_no</code> if the order is a retail pickup or delivery order received from Order Orchestration. See Building the Retail Pickup (including Ship-for-Pickup) or Delivery Order for more information. Alphanumeric, 15 positions; display-only.

Field	Description
Tax code	The code and description of the tax status on the order. Valid values are: • <i>T = Standard tax.</i> The customer is subject to all applicable state sales tax on merchandise. • <i>N = Non taxable.</i> The customer is not taxed on purchases. • <i>R = Resale:</i> The customer purchases goods for resale, and is, therefore, exempt from tax. A valid resale number must exist in the customer record or be entered during Order Entry. • <i>E = Exempt.</i> The customer is a school, or charity, and, therefore, is exempt from tax. A valid tax exempt number must exist in the customer record or be entered during Order Entry. • <i>G = GST only.</i> The customer is subject to the Canadian Goods and Services Tax (GST) because the order is shipping to a Canadian province. • <i>P = PST only.</i> The customer is subject to the Canadian Provincial Services Tax (PST), but exempt from the GST. See Working with Customer Tax Status for more information.
Tax identification	The customer's tax identification number, typically the resale or exempt certificate number assigned to a customer who is identified as tax exempt (<i>E</i>) or as a reseller (<i>R</i>); otherwise, the tax identification number does not control taxability. Any combination of letters, numbers, or special characters is accepted. Alphanumeric, 30 positions.
Master label (Master carton label)	Indicates whether the system prints a master pick slip for this order. The master pick slip displays the sold to customer's name and address and the order totals across all ship to customers on the order. Valid values are: • <i>Selected</i> = The system prints a master pick slip for this order. • <i>Unselected</i> = The system does not print a master pick slip for this order. See Performing Pick Slip Generation, for more information on printing a master pick slip for an order.
Cancel date	The date the customer wants the order canceled if it has not been shipped. The order is not canceled automatically, but is listed on the Order Cancellation List. You can cancel the order manually or contact the customer to extend the deadline. Numeric, 6 positions (in user date format); display-only.

Field	Description
IP address	The ip_addr, if any, in the <i>Inbound Order XML Message (CWORDERIN)</i> for an order received through the generic order API. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). <i>IP address validation:</i> If the IP address received was invalid, the system writes an Order Transaction History message such as <code>INVALID IP ADDRESS: 1.2.3</code> where <code>1.2.3</code> represents the invalid IP address received, and does not update this field. The IP address is made up of a series of four numbers separated by three periods (for example, <code>192.168.255.255</code>). Each number between the periods must be from 1 to 255. The IP address must: • not include any non-numeric characters besides the periods • not include any blank spaces • start with and end with a numeral • include all three periods • include all four numbers, each from 1 to 255 <i>Fraud checking:</i> If the IP address received matches an entry in the Miscellaneous Fraud table, the system puts the order on <i>IP</i> (IP address) hold and writes a message reading <code>SYS HLD---IP ADDRESS HOLD</code> to the Order Transaction History table. See Working with Miscellaneous Frauds (WMFF) for more information on IP addresses and fraud checking. Alphanumeric, 15 positions; display-only.
Warehouse	A code that identifies the warehouse from which merchandise on the order ships. A value appears in this field only if it was entered during order entry or order maintenance or was passed through the Order Orchestration Integration for a retail pickup or delivery order. The warehouse description is to the right. Warehouse code: numeric, 3 positions; display-only. Warehouse description: alphanumeric, 30 positions; display-only.
Broker delivery type	Indicates whether the order is being fulfilled through the Order Orchestration Integration. Possible settings are: • <i>Retail Pickup</i> = The order originated in an external system and Order Administration ships the order to the originating retail store location, where the customer picks it up • <i>Delivery</i> = The order originated in an external system, and Order Administration ships the order directly to the customer • <i>Ship for Pickup</i> = The order originated in Order Administration, and Order Administration ships the order to a designated retail store location, where the customer picks it up • <i>Store Pickup</i> = The order originated in Order Administration, and the customer picks up the order in a designated retail store location where the inventory is currently available

 Note:

If the order includes any brokered backorder lines (in which Order Administration assigns backordered items to Order Orchestration for fulfillment), this is not indicated here.

See the [Order Orchestration Integration](#) for an overview.

Field	Description
Sales Rep Store	The store number assigned to the order. Store numbers are defined in and validated against the Store Cross Reference table; see Work with Store Cross Reference (WSCR) .

 **Note:**
The store number defined here does not have to be associated with the salesrep from the Order Header.

Included in CWEmailOut: If the order is not fulfilled through the Order Orchestration integration, the *OriginatingStore* element in the *Outbound Email XML Message (CWEmailOut)* specifies the sales rep store and the description and address information from its Store Cross Reference record. See the *OriginatingStore* element for more information.

Alphanumeric, 10 positions; display-only.

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

Display Order Line History Screen

Purpose: Use this option to review any type of activity that has occurred since this item was entered.

The system logs all item history automatically for inquiry purposes, including order line activity received through the *Order Line History In API*, and displays this information on the Display Order Line History screen.

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

How to display this screen: Select *History* for an item at the [Order Inquiry Detail Screen](#) or at the Work with Order Lines screen in order entry.

Field	Description
Order #	A unique number to identify an order. Numeric, 9 positions; display-only, assigned by the system.
Ship to number (unlabeled field)	A hyphen (-) separates this field from the Order# field. Indicates the number of shipping addresses for the order. The system assigns a ship-to suffix of 1 to a single recipient order. Numeric, 3 positions; display-only, assigned by the system.
Line #	The detail line number of this item on the order. Numeric, 3 positions; display-only.
Item	A code for a unit of inventory. Item codes are defined in and validated against the Item table. See Performing Initial Item Entry (MITM) . Alphanumeric, 12 positions; display-only.

Field	Description
SKU (Stock keeping unit; unlabeled fields to the right of the item number)	The item's special characteristics, such as its size or color. SKUs are defined in and validated against the SKU table. Alphanumeric, three 4-position fields; display-only.
Activity	Indicates the type of update performed for the order line. Order line activity codes are defined in the Order Line Activity table; see Working with Order Line Activity Codes (WOLA). System Delivered Order Line Activity Codes are: • <i>Add (A)</i>: Includes adding an order line through an maintenance or exchange, or through a system process, such as Process Item Substitutions (PSUB). The quantity added is listed. • <i>Cancel (C)</i>: A quantity of the item on the order line is cancelled during order maintenance or through a system process, such as Process Item Substitutions (PSUB). This includes canceling using a cancel reason code not flagged to reduce demand. The quantity canceled is displayed as a negative number. • <i>Change (G)</i>: Changes to the order line, including: • increasing the quantity. An increase in quantity is displayed as a positive number. • decreasing the quantity when the cancel reason code used had the Reduce demand flag selected, regardless of whether you used the Cancel or Change option. A canceled quantity is displayed as a negative number, and the cancel reason code is listed. Canceling a partial quantity with a cancel reason code that had the Reduce demand flag unselected creates an <i>Item Partially Cancelled</i> entry, described below. • changing the price or other information for the order line. When the change does not affect the quantity, no quantity is displayed. • <i>Discount (D)</i>: A discount was applied to the order line after shipment. The quantity of the item discounted is displayed. • <i>Exchange (E)</i>: The exchanged quantity is displayed as a positive number. The exchange reason code description is also displayed. • <i>Express Bill (B)</i>: The quantity express billed and the ID of the user who started the async jobs are indicated. • <i>Item Hold (J)</i>: The order line was put on hold. The open quantity on the line when it is held is displayed.

Field	Description
	<i>Item Partially Cancelled (#)</i>: A partial quantity was canceled, either through the Cancel option or through the Change option, if the cancel reason code's Reduce demand flag was unselected. A partial cancel can also occur when a partial quantity of the line was shipped, and then the remaining quantity or the entire order was canceled. The quantity canceled is displayed as a negative number, and the cancel reason code is also listed.
	 Note: If the cancel reason code had the Reduce demand flag selected, the activity is listed as a Change rather than as Item Partially Cancelled.
	<i>Item Partially Shipped (P)</i>: A partial quantity of the item was shipped. The quantity shipped and the ID of the user who started the async jobs are indicated. <i>Item Released from Hold (+)</i>: The line was released from held status. The quantity on the order line when it was released is indicated. <i>Item Unreserved (9)</i>: The item was unreserved through Work with Void/Reprint Picks, Interactive Reservation, or the PickIn message. This message is also written when you create a store pickup order through the order API or through Modern View order entry. When the line is unreserved through the PickIn message, the default user ID is displayed. This record is not created through the Void Pick Batch option. The unreserved quantity is displayed as a negative number. <i>Order Line Message Added (8)</i>: An order line message was added. The order line quantity when the order line message was added is displayed. A single order line history entry is created each time you accept your entries, regardless of whether you create a single order line message or multiple message lines. <i>Return (R)</i>: Displays the quantity returned as a negative number. <i>Shipment (S)</i>: Displays the quantity shipped. Also, the user ID displayed is for the user who started the async jobs. <i>Sold Out (O)</i>: When an item sells out automatically in order entry or creation, the quantity displayed is a positive number. If the item was sold out through Sell Out, the quantity is negative and the name of the user who sold out the item is listed. When an item sells out through Process Auto Soldouts, the quantity displayed is negative; also, in this case, the user ID displayed is for the user who submitted Process Auto Soldouts.
	Display-only, updated by the system.
Date	The date when this activity occurred. Numeric, 6 positions (in user date format); display-only, updated by the system.

Field	Description
Quantity	The quantity of the item affected by this activity. For example, 3- indicates that three units of the item were canceled. Activities that do not affect the order quantity, such as changing the pricing of the order line, do not display a quantity here. This quantity is displayed differently depending on how the item was sold out; see Processing Auto Soldout Cancellations (MASO). Also, see each individual Activity, above, for more information. Numeric, 5 positions; display-only, updated by the system.
Exc reason (Exchange reason code)	Represents a reason for the customer to exchange one item for another. Exchange reasons are defined in and validated against the Exchange Reasons table; see Establishing Exchange Reason Codes (WEXR). Numeric, 3 positions; display-only.
Can reason (Cancel reason code)	The reason for canceling the units or reducing the quantity. A cancel reason code is not stored for soldout cancellations, whether you sell out the item by selecting <i>Sold-out</i> in order entry or order maintenance, or through Processing Auto Soldout Cancellations (MASO); however, the Auto Soldout Cancel Reason (C20) is displayed here if a backordered line was canceled at billing because the Canc B/O (Automatically cancel backorders) flag for the order was selected. Cancel reason codes are defined in and validated against the Cancel Reason table; see Establishing Cancel Reason Codes (WCNR). Numeric, 2 positions; display-only.
Rtn reason (Return reason code)	Represents a reason for the customer to return an item. Return reasons are defined in and validated against the Return Reason table; see Establishing Return Reason Codes (WRTR). Numeric, 3 positions; display-only.
Add reason (Add reason code)	Represents a reason for adding an item to the order. The system requires an add reason code if: - the Require Reason for Lines Added in Order Maintenance (D75) system control value is <i>selected</i>, or - the Required reason code field for the item offer or SKU offer is <i>selected</i>. Add reason codes are defined in and validated against the Add Reason table; see Establishing Add Reason Codes (WADR). Alphanumeric, 5 positions; display-only.
User	The user ID of the person who performed this activity. Your default user ID defaults for some activities. In most cases, the ID of the user who maintained the order is displayed; however, activities that show the ID of the user who started the async jobs are indicated in the description of the Activity, above. The user ID does not display if you sell out an item through Processing Auto Soldout Cancellations (MASO) rather than order entry or order maintenance. Alphanumeric, 10 positions; display-only, updated by the system.

Display Order History Screen

Purpose: Use this option to review any type of activity that occurred since the order was entered, including order activity received through the *Generic Order Transaction History API*.

The system logs all order history automatically for inquiry purposes, including when the order was:

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

- Authorized, reauthorized, or declined
- Canceled
- Held
- Maintained
- Released
- Logged as a sale (when the invoice was generated)
- Shipped
- Sold out

The system records these activities against the order on the Display Order History screen. The system can record up to 999 transactions for each order. This information remains on the system for inquiry purposes until the order is purged.

Subscriptions: The system also records order history for each subscription generation. This occurs when you are [Generating the Subscription Extract Table \(WGSE\)](#) for items identified as subscriptions (if the Subscription field for the Item is *selected*). For example, six entries would be logged to the Order History for a 6-month subscription, reflecting each time another issue of the subscription item is included in the Subscription Extract file.

Information captured: The system captures the following information on the Display Order History screen:

- Date and time of activity
- Type of activity
- Transaction note
- Amount
- User ID

Tracking packages: Use the *Package Info* option to advance to the [Display Package Information Screen](#), where you can review shipment tracking numbers and, depending on the ship via, advance to the shipper's web site to review tracking history. The *Package Info* option is available if you have received any tracking numbers related to shipments on the order.

Special characters? If there are any special characters in the Order Transaction History message, the system replaces the first special character, excluding any underscores, with a space when you advance to this screen.

How to display this screen: Select *Order History* at the:

- [Work with Order Lines Screen](#) in order maintenance
- [Order Inquiry Header Screen](#) or [Order Inquiry Detail Screen](#)

Field	Description
Order #	A unique number to identify an order. Numeric, 9 positions; display-only, assigned by the system.

Field	Description
Sold to (Sold to customer name)	The name of the customer who placed the order. Last name The customer's last name. Alphanumeric, 25 positions; display-only. First name The customer's first name. Alphanumeric, 15 positions; display-only. Initial The initial of the customer's middle name. Alphanumeric, 1 position; display-only.
Ship to (Ship to customer name)	The name of the customer to receive the order. These fields are blank if the Sold To Customer receives the order. Last name The customer's last name. Alphanumeric, 25 positions; display-only. First name The customer's first name. Alphanumeric, 15 positions; display-only. Initial The initial of the customer's middle name. Alphanumeric, 1 position; display-only.
Date	The date when the order activity occurred. Numeric, 6 positions (in user date format); display-only, updated by the system.
Type	A code for a type of update against the order. The OTH_TRANSACTION_TYPE code in the ORDER_TRANSACTION_HISTORY table is indicated in parentheses. Valid values are described below. Related Transaction Notes are also described if they add additional information. If an Amount is specified for the entry, it is mentioned below as well; otherwise, the Amount is blank. • <i>Assignment Updated</i> (T) = Workflow task assignment creation or update. Examples of Transaction Notes include Task Created/Resolved, or the rule applied. • <i>Auth</i> (A) = Manual authorization applied for credit card or other activity, such as an authorization reversal. The Transaction Notes provide further details, for example: MANUAL AUTH# DETECTED - ABC1234. The letter A is displayed as the transaction Type. The amount authorized is listed in the Amount field. • <i>BO Cards</i> (K) = Backorder card evaluation and update to the Order Detail record. The Transaction Note provides further details, for example: 1st B/O-line 2, ship date 18/11/19. See Purchase Order Layering and Backorder Notifications for an overview. • <i>Call Tag</i> = Call tag printed. This option is not currently implemented. • <i>Cancel</i> (C) = A customer membership was canceled. The Transaction Note indicates the membership that was canceled, for example: Membership MEMB01 cancelled. • <i>D/S PO</i> (D) = Drop ship purchase order generated. The Transaction Note indicates the purchase order number generated, for example: DROP SHIP PO# 0000102 CREATED. • <i>Hold</i> (H) = Hold applied through order maintenance or as a result of credit checking. The Transaction Note indicates the hold reason, for example: SYS HLD---SYSTEM HOLD MISC FRAUD.

Field	Description
	<i>Letter (L)</i> = Notification (card, email, or <i>Outbound Email XML Message (CWEmailOut)</i>) generated for the customer or vendor related to the order. The Transaction Note provides information on the notification type and customer address, for example: Ord Conf to e.johnson@example.com. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Narvar notices: When you use the Narvar Integration, the <i>Letter</i> notification type for a shipment email can be: - Order sent to Narvar: The Narvar Order Request Message was generated, even if the email address specified was the Narvar Non-Deliverable Email Address for Shipment Confirmations (M59). See that system control value for more information. - Failure sending order to Narvar: The Narvar Order Request Message could not be generated. For example, this message could mean that the Narvar Integration Setup was not correct. - Order not eligible to be sent to Narvar: This message can indicate: - f - This is a store pickup order. - This is a fulfilling order for an order assigned back from Order Orchestration if the Use OROB for Fulfillment Assignment (M31) system control value is selected. - This is a retail pickup order that is a fulfilling order for a ship-for-pickup order, and the merchandise was shipped to the store location for customer pickup. - The user ID and password specified for Narvar Service are not valid. See Work with Outbound Web Service Authentication Screen for more information. For more information: See Narvar Troubleshooting. - Registry order: A Letter (L) history record is also created when you create an order line for a registry item. <i>Maint (M)</i> = Maintenance through Order Maintenance. The system also uses this code when it applies a prorated discount, when activity takes place related to the Order Orchestration Integration, when an order is released from hold through a screen, when an order is accepted in batch order entry, when an item is re-reserved, or when the arrival date on a line is updated through the <i>Order Maintenance API</i>. The Amount indicates the order total at the time of maintenance. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

 Note:

Starting with release 18.0, the system no longer creates Maintenance records for activity updates from Order Orchestration. See above for the individual records created when an order is accepted, shipped, picked, or picked up.

Field	Description

 Note:

A separate Order Canceled record is created when an order is canceled in maintenance only if no items have shipped for the order.

- *Order Accepted* (3) = Store Accepted Order. Order Orchestration indicated that the fulfilling store location accepted the order or line. The line number is indicated in the Transaction Note.
- *Order Cancelled* (X) = Order Cancelled. The non-quote order was canceled before any items were shipped. A few things to note:
- This entry does not indicate whether the cancel reason used was flagged to update demand.
- The Amount indicates the total amount of the order including freight, regardless of whether the Recalculate freight option was selected at order cancellation.
- This entry is created separately for each ship-to on the order.
- A Maintenance record is also written in addition to the Order Canceled record.

Field	Description
	• <i>Order Message (7)</i> = Order Message Added. An order message was written for the order. • <i>Order Picked (4)</i> = Store Picked Order. Order Orchestration indicated that the assigned fulfilling location picked the order. • <i>Order Picked Up (6)</i> - Customer Picked Up Order. Order Orchestration indicated that the customer has picked up the order from the store location. The line number is indicated in the Transaction Note, for example: Ln#: 2 Customer Picked Up Order. • <i>Order Shipped (5)</i> = Store Shipped Order. Order Orchestration indicated that the fulfilling location shipped the order. The line number is indicated in the Transaction Note. • <i>Pick Gen Error (!)</i> = Problem Generating Pick. A stock allocation error occurred. The line number is indicated in the Transaction Note, for example: Problem Generating Pick - Order line 2. • <i>Pick Generated (P)</i> = Pick Gen. A pick slip was generated. This message is written when you use cart/bin picking. The Transaction Note indicates the pick control number, warehouse, and cart/bin, for example: Pk 212 Whs 1 Ct/Bn 111/108/2.

 Note:

Starting with release 18.0, the system no longer creates a Pick Gen (P) record when a stock allocation error occurs.

- *Price Override (W)* = Price override. The price of an item was overridden. The system does not write a price override history message here when it applies the [Default Price Override Reason \(B35\)](#). The Transaction Note indicates the order line updated; for example, User price override - Order line 1. The Amount indicates the unit price of the item after applying the override.
- *Quote Maintenance (@)* = Quote was maintained. The Amount indicates the order total when the quote was maintained.

 Note:

If the quote was canceled during maintenance, a maintenance (M) record is also created, indicating the cancel reason.

- *R/A Maintenance (*)* = A return authorization was created, received, or credited through Working with Return Authorizations. The Transaction Note indicates Order was maintained through R/A. The Amount is the refund amount.
- *Refund (F)* = Refund processed or changed. The Transaction Note indicates the type of update; for example, Refund has been released or CC Crd for inv#101 processed.
- *Release (R)* = The order was released from hold. The Transaction Note indicates the hold reason code and part of the user ID or process that released the order, for example: Order 131 released from ER HOLD EK. When a user hold is released through the *Order Maintenance API*, the message indicates RELEASED FROM USER HOLD (API).

Field	Description
	For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). • <i>ROL Error</i> (2) = The system did not print a pick slip for the specified order line because the Qty remaining or Qty printed in the Reserved Order Line table does not tie correctly to the Qty reserved or Qty printed in the Order Detail table. The system also prints the order line on the Unmatched Reserved/Remaining Qty Report. The Transaction Note indicates the line number; for example, Pick not printed Ln # 001 qty mismatch. The Amount is the extended price of the order line.
	 Note: Contact Center does not display the ROL Error under Order Activity.
	• <i>Rtn Auth</i> (N) = R/A Credit pending processing. A return or exchange was created for the order or an order line. The Amount indicates the total amount of the credit. • <i>Shipment</i> (S) = A shipment or credit bills. Multiple entries are written when a pick slip is confirmed and processes in billing. Sample Transaction Notes might be: • Pick slip confirmation: Pick# 212 Mtr 0.00 Wgt 0.00, Via 1 T#, Via 1 T#ABCD1234, and Pick# 0000212 Billed on Invoice# 000012. The shipment total is the Amount indicated for the entry related to the invoice creation; for example, Pick# 0000212 Billed on Invoice# 000012. • Express-billed shipment or return: EXPRESS BILLED ON INVOICE # 0000127. • <i>Sold Out</i> (O) = Item sold out automatically based on the value in the S/O field for the item, and a soldout notification generated. The Transaction Note indicates the line number, for example: S/O card generated-line 3. • <i>Subscription</i> (B) = An issue for the subscription was generated. The Transaction Note indicates the issue number and subscription code, for example: Issue# 002 sent for SUBSCRIPTION. • <i>System Update</i> (Y) = Can be written with the following Transaction Notes: – Suppress refund updated to on p/t 4 (no Amount indicated) – Award amt not redeemed-card number not found (Amount indicated) – Pick BO cancel failed - Invalid Reason (no Amount indicated; written when a backorder cancellation reason passed in the CWPickIn XML Message was not numeric) – Pick BO cancel reason was truncated (no Amount indicated; written when the backorder cancellation reason passed in the CWPickIn XML messages was a number longer than 2 positions) – Loyalty Award Redemption Failed! (loyalty award Amount indicated; written when communication fails after applying a loyalty award to an order, but before final order acceptance) – Total Prorated Order Level Discount (indicates the loyalty Award amount; written when a loyalty award is applied to the order)

Field	Description
	<i>Unreserved (U)</i> = Interactive reservation. Indicates that an item was reserved or unreserved manually, such as through Working with Interactive Reservation (MIRV) or Reprinting and Voiding Pick Slips (WVRP or WSVF). The Transaction Note indicates the line number that was unreserved, for example: Order Line 1 unrsv'd w/BO qty of 1. <i>Upsell Promo (E)</i> = Promotion discount applied. The Transaction Notes indicate both the type of discount, and the promotion name and description, for example: Total Prorated Order Level Discount and 10%OFF - 10% OFF ORDER, where 10%OFF is the promotion name and 10% OFF ORDER is the promotion description. The Amount indicates the discount amount applied. <i>User Defined (Z)</i> = The order activity was received through the <i>Generic Order Transaction History API</i>. The Transaction Note and Amount are from the inbound message. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). <i>Void/Reprint (V)</i> = Pick ticket voided through Working with Interactive Reservation (MIRV) or Reprinting and Voiding Pick Slips (WVRP or WSVF). The Transaction Note indicates the original and new pick control number; for example, Pick 166 reprinted as pick 184. Display-only, updated by the system.
Transaction note	The description of the activity related to the transaction, such as: - Authorization - Flag for cancellation due to declined authorization - Backorder notification evaluation and Order Detail update - Backorder notice generated (for example, BO 1st Ntf for a first backorder notification) - Cancel - Cancel request for a drop ship item - Cancel confirm or reject for a drop ship item - Drop ship - Hold - Ln#: 2 Submitted To Broker (or other activity related to Order Orchestration; see Order Orchestration Integration for more information) - Ord Conf to ssmith@example.com (Order confirmation email or <i>Outbound Email XML Message (CWEmailOut)</i>) For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). - Order Line 1 Updated Arrival Date = the arrival date was updated through the <i>Order Maintenance API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). - Pk 1234567 Whs 1 Ct/Bn 12345/123/1 if you performed pick slip generation and the Use Cart/Bin Picking? (B38) system control value is selected and the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is unselected - Pk 1234567 Whs 1 Batch # 12345 if you performed pick slip generation and: - the Use Cart/Bin Picking? (B38) system control value is unselected, or - the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected - Promotion (PROMO1) not applied - Maintenance

Field	Description
	- Release - RELEASED FROM USER HOLD (API) = A user hold was released through the <i>Order Maintenance API</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). - Request ID: 12345 Under Review: N = Order Administration has send an order update message to Order Orchestration when an order including any brokered backorder items has changed from held to open. Order Administration sends these updates only if the Send Held Orders to OROB (M18) system control value is selected. If the order changed from open to held, the message indicates Under Review: Y. - Retrn conf (Return confirmation email or <i>Outbound Email XML Message (CWEmailOut)</i>) For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). - Shipment - Ship conf (Shipment confirmation email or <i>Outbound Email XML Message (CWEmailOut)</i>) For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). - Shipment Confirmed for drop ship PO # XXXX. For confirmed shipment of a drop ship item, the transaction notes also include item code, meter charge, weight, ship via and description, and tracking number. - Sold out - Subscription generation - Pick not printed Ln # 001 qty mismatch - User price override - Order line 2 Note: - The line number in this message refers to the sequence number in the Order Detail table, which may differ from the current line number. - The system does not write a price override history message here when it applies the Default Price Override Reason (B35). Alphanumeric, 40 positions; display-only, updated by the system.
Amount	The total order amount following the order activity, including merchandise, freight, tax, handling, etc. No amount is associated with issuing a subscription, as the system bills the customer for the entire amount of the subscription when billing the order. For an order cancellation (before any items have shipped), the dollar amount listed includes freight, regardless of whether the Recalculate freight option was selected at order cancellation. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
User	The user ID of the person who performed this activity against the order. - If the system performs the activity automatically, such as releasing prepaid orders on time hold, the user ID is the name of the person who started the ASYNC processing program (background jobs). - If the activity took place through a system process or an API, the user ID indicates the process, API, or your default user. <i>EXTERNAL</i> defaults for order transaction history created through the <i>Generic Order Transaction History API</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Alphanumeric, 10 positions; display-only, updated by the system.

Option	Procedure
Display the time when the order activity occurred	Select <i>Display Time</i> for an order activity to advance to a window that displays the <i>Transaction note, Date,</i> and time, in HH:MM:SS format, when the order activity occurred.
Track packages or display carton contents	Select <i>Package Info</i> to advance to the <i>Display Package Information Screen</i> , where you can review shipment tracking numbers and, depending on the ship via, advance to the shipper's web site to review tracking history. The <i>Package Info</i> option is available if you have received tracking numbers or carton contents information through the <i>Generic Pick In API (Shipments, Voids, and Backorders)</i> . For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Display Package Information Screen

Purpose: Use this screen to review shipment tracking information for an order. This information can come from the *Generic Pick In API (Shipments, Voids, and Backorders)* and from *Manually Confirming Shipments (MCON)*.

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

Links to tracking page at shipper's web site: This screen displays the shipment tracking number for each shipment on the order. If shipment tracking is available on the shipper's web site, the shipment tracking number is also a live link to the shipper's shipment tracking web page, where you can review shipment history.

If using Narvar: If you are using the *Narvar Integration*, the *Tracking #* is a live link enabling you to track the shipment, provided:

- You have completed setup of the related system control values, including the *Narvar Track URL Prefix (M60)*.
- You have specified the *Narvar Carrier Name* for the ship via.
- You specified a tracking number when confirming the shipment.
- All other configuration was completed for Narvar, as described under *Narvar Integration Setup*.
- After you enable Narvar, tracking number links that were created previously do not work automatically when you click on them at this screen.
- The tracking number link can still be available if all the above requirements are met, even if the customer did not receive a shipment confirmation when, for example, the customer has opted out of email communication.
- The tracking link is not supported for drop ship purchase orders or shipments made for originating orders through Order Orchestration integration. The tracking link is supported for drop ship picks, and for fulfilling orders received through Order Orchestration integration.
- If carton details were not provided for the tracking numbers, which is possible when you use the generic pick in API, it might not be possible to identify the order lines shipped with each tracking number.

Required for tracking: The [Narvar Track URL Prefix \(M60\)](#) is required for a valid tracking number link to be enabled in emails or on screens. If you are using the Narvar integration and submit an order request to Narvar while the tracking URL prefix is not defined, the Narvar.log file contains errors such as:

```
Shipment tracking is disable for company 123
```

```
Unable to construct shipment tracking URL for order 456
```

Where 123 is the company number and 456 is the order number.

Error displayed: Also, if the tracking URL is not defined, when you click on the tracking number link at the screens mentioned above, an error window indicates: `Tracking information not available. Check Narvar Order Error Export screen for failures.`

If not using Narvar: Otherwise, if you are not using the Narvar integration:

- *Supported ship via types:* Live links to shipment tracking web pages for shippers are available if the ship via type is:
 - UPS
 - Federal Express
 - Parcel Post (*not* Parcel Post Class 1, 2, 3, or 4)
- If the ship via type is anything other than UPS, Federal Express, or Parcel Post, you can still advance to the Display Tracking Numbers screen; however, the tracking number is not a live link.

See [Working with Ship Via Codes \(WVIA\)](#) for information on setting up ship vias, including how to specify the ship via type.

Carton contents: If you have received carton content information through the *Generic Pick In API (Shipments, Voids, and Backorders)*, a carton icon displays for the shipment. You can expand the carton icon for a shipment to display the items included in the carton.

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

**Note:**

When you use the generic Pick In API, the system does not verify that the reported carton contents match the information on the pick slip.

How to display this screen: Select *Track Packages* at the [Display Order History Screen](#). This option is available only if:

- there are one or more shipped items on the order, and
- you have entered a tracking number when using [Manually Confirming Shipments \(MCON\)](#), or
- you have processed a shipment through the generic Pick In API.

Field	Description
Scan date	The date when the package was scanned for shipment, as reported through the <i>Generic Pick In API (Shipments, Voids, and Backorders)</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Numeric, 6 positions (in user date format); display-only.
Scan time	The time when the package was scanned for shipment, as reported by through manual confirmation or through the <i>Generic Pick In API (Shipments, Voids, and Backorders)</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Numeric, 6 positions (HH:MM:SS format); display-only.
Tracking #	The shipping tracking number, as reported through manual confirmation or through the <i>Generic Pick In API (Shipments, Voids, and Backorders)</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Live link? The tracking number is a live link if you use Narvar or if the ship via type is UPS, Federal Express, or Parcel Post (<i>not</i> Parcel Post Class 1, 2, 3, or 4). If the link is live, you can click it to advance to the shipper's web site and review shipment history. Alphanumeric, 30 positions; display-only.
Ship via	The description of the shipper who delivers the package. Ship via codes are defined in and validated against the Ship Via table. See Working with Ship Via Codes (WVIA) for more information.
 Note: The description is truncated if it exceeds 30 positions.	
Alphanumeric, 30 positions; display-only.	

Carton icon: If you have received carton content information through the *Generic Pick In API (Shipments, Voids, and Backorders)*, a carton icon displays to the left of the scan date for the shipment. Open the carton by clicking it to display the items packed in the carton:

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

- **Closed carton:**



- **Open carton:**



Carton contents: If you open the carton to display the carton contents, the additional fields are:

Field	Description
Items	The item or SKU reported as packed in the carton. The <i>Generic Pick In API (Shipments, Voids, and Backorders)</i> identifies a packed item or SKU as part of a shipment confirmation for a pick slip by specifying the pick control detail line. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
	 Note: The system does not validate that all items that are confirmed as shipped are also reported as packed in a carton.
Qty	Item: 12 positions, alphanumeric; display-only. SKU: three 4-position fields, alphanumeric; display-only. The quantity of the item reported as packed in the carton. When you receive information through the Pick In API, the system does not validate whether the quantity reported as packed matches the quantity confirmed as shipped. Numeric, 5 positions; display-only.
Description	The description of the item and SKU. If the item has SKU's, the item and SKU descriptions are separated by a space. Item description: alphanumeric, 120 positions; display-only. SKU description: alphanumeric, 40 positions; display-only.

Performing Order Maintenance

In this part: These topics describe how to update an existing order on the system:

- [Introducing Order Maintenance](#) describes how to access Order Maintenance to update an existing order and lists the features and restrictions of this program.
- [Selecting an Order for Maintenance](#) describes how to identify the order you wish to update or how to locate a particular order from a scan of orders.
- [Work with Order Screen in Order Maintenance](#) lists the fields you can update on the Work With Order screen, describes the results of your updates, and identifies any conditions or restrictions for updating each field.
- [Changing Item Detail Line Information in Order Maintenance](#) lists the fields you can update on the Work With Order Line screen, describes the results of your updates, and identifies any conditions or restrictions for updating each field for a specific item on the order.
- [Adding an Item in Order Maintenance](#) describes how to add an item to an existing order or how to reopen a closed or canceled order when you add an item.
- [Increasing the Quantity Ordered in Order Maintenance](#) describes how to increase or decrease the number of units ordered of an item and describes how to account for the item cancellation when you reduce the quantity ordered.
- [Canceling an Item in Order Maintenance](#) describes how to cancel a single, unshipped order detail line on an existing order and describes how to account for the item cancellation from the order.

- [Canceling an Order through Order Maintenance](#) describes how to cancel an entire order and describes how to account for the item cancellations resulting from the order cancellation.
- [Returning and Exchanging Items in Order Maintenance](#) describes how to perform an item return or exchange by first creating a return authorization, receiving the merchandise return, and crediting the customer.
- [Enter Payment Methods Screen in Order Maintenance](#) describes how to add a payment method to the order to release it from hold or how to change or delete payment information already defined for the order.
- [Adding a Recipient Order in Order Maintenance](#) describes how to enter an additional order to an existing order that will ship to a different address.
- [Maintaining Quotes in Order Maintenance](#) describes the updates you can apply to a pre-order quote before converting it to a regular order.
- [Converting Quotes to Orders](#) describes how to convert a pre-order quote to a regular order and the updates that the system performs.
- [Order Line History In API](#) allows you to receive order line history from an external system.
- [Order Maintenance API](#) allows you to remove a user hold or update the arrival date for an order line.
- [Order Maintenance API](#) allows you to update the arrival date, remove a user hold, or both.

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

Introducing Order Maintenance

Purpose: Use the Order Maintenance function to update an existing order by:

- Changing customer, order, item, or payment information
- Adding a recipient order
- Adding a payment type
- Adding an item
- Canceling an item
- Canceling an order
- Returning an item
- Returning an order
- Exchanging a line
- Holding a line
- Releasing a line

Additionally, you can select this option to review order history.

You can maintain orders only if they have been accepted (and processed).

Quotes: You use the same order maintenance screens to maintain a quote. However, the system displays the screens for a quote in Review mode. See [Maintaining Quotes in Order Maintenance](#) for more information on maintaining quotes.

Pick slip preparation: When you advance to order maintenance, the system removes any pick slip preparation that may exist for the order; see [Removing Pick Slip Preparation from an Order](#).

In this topic:

- [Order Maintenance Features](#)
- [Order Maintenance Restrictions](#)
- [Order Maintenance Processing](#)
- [Secured Features Controlling Access to Order Maintenance](#)

Order Maintenance Features

Order Maintenance allows you to perform most Order Entry functions and offers these features:

- Uses a similar screen layout as Order Entry, and provides the function keys to cancel, return, review order history, etc.
- Enables you to accept or reject your changes to an order; if rejected, the system resets the order to the same condition prior to Order Maintenance
- User or user class security controls Order Maintenance access; see the [Order Maintenance Access \(A22\)](#) field in the Security table.
- Logs all order updates by date, time, maintenance activity, and user ID
- Lets you reopen a closed order by adding new items to the order
- Lets you perform a return on a shipped order line
- Lets you change the source code on the order only if the new source code uses the same freight and pricing methods as the original source code
- Prohibits more than one user from maintaining an order
- Lets you place an order on hold
- Automatically updates order status if the order becomes eligible for release or hold following maintenance
- Automatically generates a refund or credit if maintenance activity changes order totals appropriately
- Displays unresolved action messages for a customer
- Reprices items on the order if you use price table pricing (see [Changing Item Detail Line Information in Order Maintenance](#))
- Advances automatically to the [Work with Customer Profile Screen](#) if you need to obtain mandatory demographic information for a customer, if the [Prompt for Mandatory Demographics in Order Maintenance \(E60\)](#) system control value is selected.

Order Maintenance Restrictions

Order Maintenance does not:

- Display Promotional pricing pop-up windows
- Perform end-of-order repricing unless you use price table pricing; see [Changing Item Detail Line Information in Order Maintenance](#)
- Add free gifts (except through price tables; see [Changing Item Detail Line Information in Order Maintenance](#))

- Perform promotional pricing to add incentive items or discounts to the order unless you use customer price group pricing
- Let you cancel a quantity of an item if a pick slip has been printed (you must select the Void/Reprint Pick Slips option; see [Manually Confirming Shipments \(MCON\)](#)).
- Let you change an item detail line in any way if a pick slip has been printed (you must select the Void/Reprint Pick Slips option; see [Manually Confirming Shipments \(MCON\)](#)).
- Let you change an item detail line if shipments have been made against the line or if the line has been canceled
- Let you change a payment method if it has been charged
- Let you change a source code to a source code for a different offer
- Let you change the source code on the order or the item detail line if shipments have been made for the order
- Let you change the customer sold-to or ship-to number
- Let you release an order except by applying a payment (see [Releasing Held Orders](#))
- Let you maintain an order until the system has completed processing a return, exchange, cancellation or shipment (order is being billed). The system displays a message such as:

Order #xxx in use by RA/Billing.

For more information: See [Secured Features Controlling Access to Order Maintenance](#) for more information on the secured features that control order maintenance for different types of orders.

Order Maintenance Processing

In general, after you maintain an order the system:

- recalculates the order totals and adjusts demand totals (number of orders) appropriately
- performs credit checking to place the maintained order on hold, if the maintenance results in some type of hold condition
- submits the order for credit card authorization if you change or add credit card pay type information; this ensures that the new order total is authorized
- submits any newly eligible backordered lines to Order Orchestration for fulfillment; see [Brokered Backorders](#) for more information.
- submits an update message to Order Orchestration if you sell out or cancel an item on a retail pickup or delivery order; see [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for more information.
- captures the date, time, maintenance activity, and user ID in the Order Transaction History table to keep an on-line history of all order updates; see [Display Order History Screen](#).
- evaluates the order to determine if it qualifies for pick slip preparation; see [Preparing Orders for Pick Slip Generation](#) and [Applying Pick Slip Preparation to an Order](#).

Web Services Supporting Order Maintenance

Optionally, you can update orders through the following:

- *Order Maintenance API* enables you to release a user hold or update the arrival date for an order line.
- *Generic Pick In API (Shipments, Voids, and Backorders)* enables you to apply a user hold reason.

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

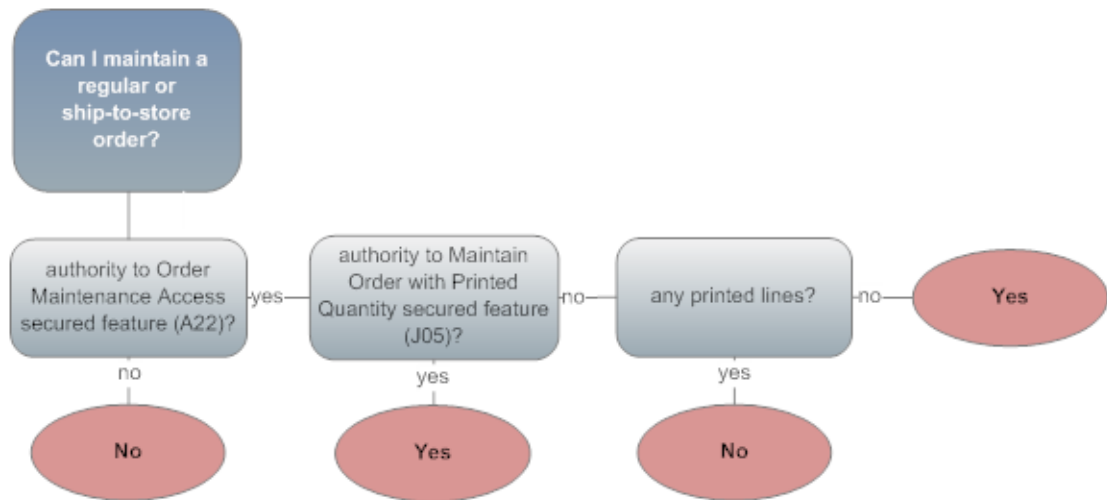
Secured Features Controlling Access to Order Maintenance

Overview: The following table lists the secured features that control access to maintenance or cancellation of orders, including those fulfilled through the [Order Orchestration Integration](#):

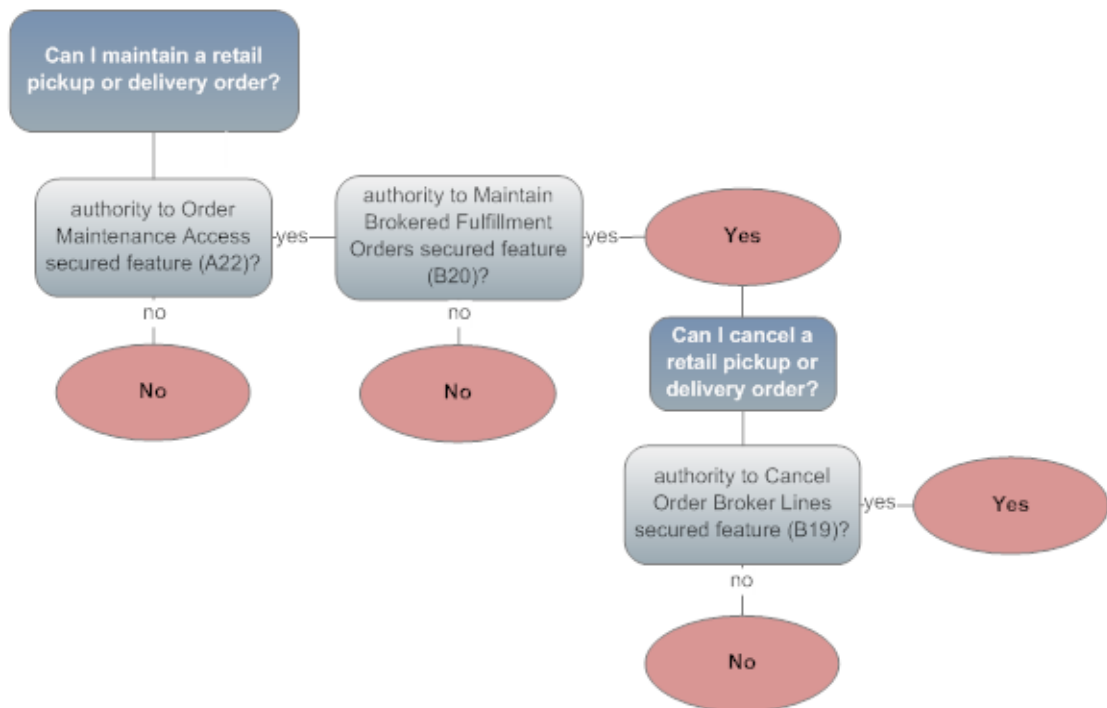
Secured Feature	Controls the Ability To:
Order Maintenance Access (A22)	maintain any order, subject to the additional secured features listed below
Maintain Order with Printed Quantity (J05)	maintain an order, including a ship-for-pickup order or a brokered backorder, with a printed quantity on any order line
 Note: Does not control access to retail pickup or delivery orders or prevent you from canceling a store pickup order.	
Maintain Brokered Fulfillment Orders (B20)	maintain a retail pickup or delivery order
 Note: If you have authority, you can process a sellout or return, or add a payment method to a retail pickup or delivery order sent from Order Orchestration. However, you cannot perform any other updates to a retail pickup or delivery order regardless of your authority.	
Cancel Order Broker Lines (B19)	cancel a retail pickup, delivery, or store pickup order, or a brokered backorder

The authority required to maintain or cancel different orders based on whether they are fulfilled through the [Order Orchestration Integration](#) is illustrated in the following flow charts.

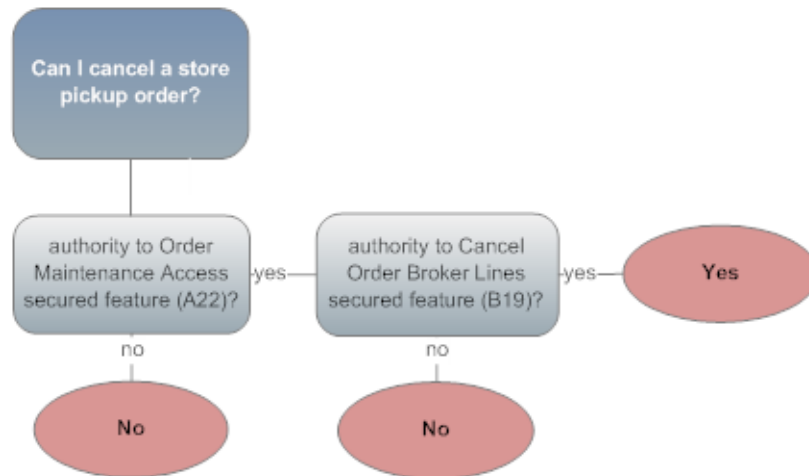
Maintaining a regular or ship-for-pickup order: The following chart summarizes the authority required to maintain a regular or ship-for-pickup order:



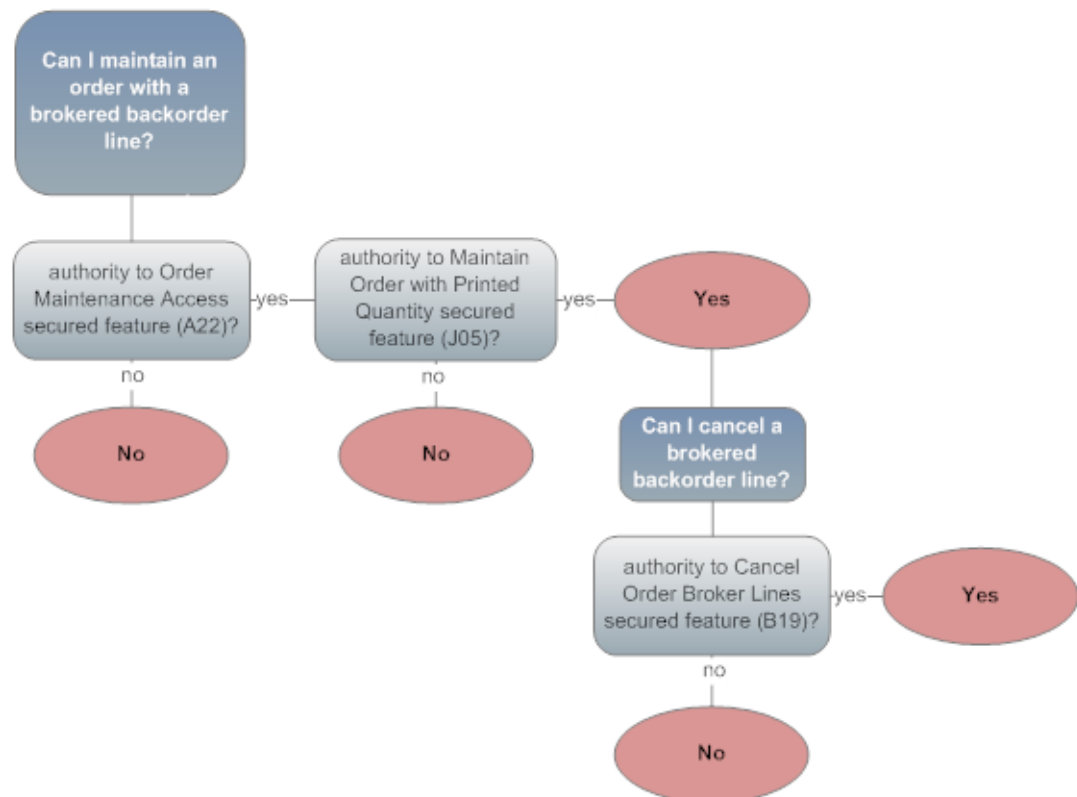
Maintaining a retail pickup or delivery order: The following chart summarizes the authority required to maintain or cancel a retail pickup or delivery order:



Canceling a store pickup order: The only possible maintenance of a store pickup order is to cancel it. The following chart summarizes the required authority.



Maintaining an order that includes any brokered backorder lines: The following chart summarizes the authority required to maintain an order that includes any brokered backorder lines:



For more information: See:

- [Setting Up Secured Features](#) for information on additional secured features that control specific options within order maintenance
- [Order Orchestration Integration](#)

Selecting an Order for Maintenance

Purpose: Use the Order Maintenance selection screen to find the order you wish to maintain, using information you have about either the order or the customer.

In this topic:

- [Order Maintenance Selection Screen](#)
 - [Cross-company Scanning](#)
- [Advancing from Customer and Order Scan Fields](#)
 - [Customer Scan Screens in Order Maintenance](#)
 - [Order Scan Screens in Order Maintenance](#)
 - [Customer Note Window](#)
 - [PayPal Warning Window](#)
 - [Warning: Order Locked Window](#)
 - [Maintaining Retail Pickup or Delivery Orders from Order Orchestration](#)
 - [Maintaining a Ship-for-Pickup Order](#)
 - [ChannelAdvisor Warning Window](#)

Order Maintenance Selection Screen

Purpose: Use this screen to find an order for maintenance, or to advance to additional scan screens where you can select the order.

Customer Workflow Management window: The [Customer Workflow Management Window](#) automatically displays when you first advance to the Order Maintenance selection screen if open or in use ticklers exist for the sold to customer on the order. Select *Ticklers* at this window to advance to the [Work with Ticklers Screen \(sold to customer view\)](#) where you can review and work with ticklers associated with the sold to customer.

How to display this screen: Enter *OEOM* in the Fast path field on any menu or select Order Entry/Order Maintenance from a menu; then select *Maintain Orders* at the [Default Values for Orders screen](#), the [Select Customer Sold To For Order Screen](#), or the [Customer Selection Screen](#).

Cross-company Scanning

If you are working within a company set up for cross-company scanning, you can scan for customers in any other company that has a similar setup in the Company table. See [Working with Companies \(WCMP\)](#) for more information on working with companies.

You can scan for customers across companies with the following fields:

- Postal code
- Match code
- Postal code, restricted by Company name
- Postal code, restricted by Customer name

When you scan on any of these fields, you advance to a subsequent customer scan screen displaying information, including the company code, for customers that match your entry. You cannot scan by Company name or Customer name alone; however, you can restrict your scan on Postal code by your entry in either field.

If you advance to Order Maintenance for a customer from a different company, all of the system control values from the new company will be in effect. When you exit the order, you will return to your default company.

Field descriptions: It is common to enter information in several fields when scanning for a specific order. For example, you might enter values in the Item, Order status, and Order date fields to review open orders entered prior to a certain date that contain a certain item.

Field	Description
Order scans	
Order #	A combination of the order and ship-to record number. The system assigns a unique number to every order created through Order Entry. You advance directly to the Work with Order Screen in Order Maintenance if you enter a valid order number. The system, however, displays a message if you enter a nonexistent order number: Order Ship-to not found. Numeric, 8 positions; optional.
Sold-to customer	A system-assigned code that identifies the customer who placed the order. Use this field to advance to the Scan Orders by Customer screen. See Order Scan Screens in Order Maintenance. Ghost customers: If you enter the customer number of a ghost customer, the scan screen does not display any orders; this is because a merge/purge has assigned any orders using that customer number to the “target” customer. You can identify a ghost customer by the setting of the Ghost flag.
	 Note: Even if you use the Customer Engagement Customer Integration, you do not use the Customer Scan Screen in order maintenance when searching for a customer; see the Customer scans for information on scanning based on customer information in order maintenance.
Recipient customer	Numeric, 9 positions; optional. A system-assigned code that identifies the customer who receives the order. This number consists of the 9-digit sold-to customer number and the 3-digit ship-to suffix. Use this field to advance to the Scan Orders by Customer Ship To screen. See Order Scan Screens in Order Maintenance. Recipient customer number: numeric, 9 positions; optional. Recipient customer ship-to number: numeric, 3 positions; optional.
Item/SKU	A code representing a unit of inventory. SKU code (separated from the item code by a slash): The item's unique characteristics, such as its size, color, and width. Use these fields to advance to the Scan Orders by Item screen. See Order Scan Screens in Order Maintenance. Item code: alphanumeric, 12 positions; optional (required if you also enter SKU information). SKU code: alphanumeric, three 4-position fields; optional).

Field	Description
Order status	Indicates the condition of the order on the system. The order status is open (active) unless the status field is set to one of the following values: • blank (all orders, including open; however, if you leave this field blank, you must also select another scan option) • Cancelled • Error • Held • Shipped • Purged • Quote • Suspended Use this field to advance to the Scan Orders by Order Status screen. See Order Scan Screens in Order Maintenance.

 Note:

Suspended or Error orders are not eligible for maintenance; use batch order entry to work with these orders. See [Introducing Order Batches](#) for more information.

	Optional.
Order date	The date that the order was entered on the system. Use this field to advance to the Scan Orders by Date screen. See Order Scan Screens in Order Maintenance.
	Numeric, 8 positions (in user date format); optional.
Order cross ref #	The order number, if any, that was passed through the <i>Generic Order Interface (Order API)</i> and used to identify the order in an external system. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). This is the Alt ord displayed at the Display Order Properties Screen. In the case of a retail pickup or delivery order assigned through the Order Orchestration Integration, this is the order number in the system originating the order. If the originating system is Order Administration, the system prefaces the originating order number with the text ORIG# :. For example: ORIG# : 9999-001, where ORIG# : indicates the order originated in Order Administration, 9999 is the original order number in Order Administration, and 001 is the ship to number. Enter a full or partial order cross reference number to advance to the Scan by Order Cross Reference # screen. If you wish to review all retail pickup and delivery orders whose originating system is Order Administration, enter ORIG# : in the Order cross ref # field and select <i>OK</i> to advance to the Scan by Order Cross Reference # screen where all orders whose E-Commerce order number in the Order Header Extended table begin with ORIG# : display. See Order Scan Screens in Order Maintenance. Alphanumeric, 35 positions; optional.

Field	Description
Alternate customer #	The alternate customer number defined for the customer who placed the order. Alternate customer number is an additional number to identify the customer on the system, such as a customer number carried over from a system conversion. Enter an alternate customer number to advance to a subsequent scan screen that lists customers by alternate customer number. See Display Alternate Customer Cross Reference Window (I84) for more information. Alternate Customer Number Label Description The field label on this screen is based on the name you enter in the Alternate Customer Number Label Description (H95) system control value; if you do not enter a name in this system control value, the field label is Alt cust. <i>Example:</i> If you enter the field label name <i>MEMBER#</i> in the system control value, the field label on this screen is <i>MEMBER#</i>.  Note: Scanning by the alternate customer number of a ghost customer is not currently implemented if the Display Alternate Customer Cross Reference Window (I84) system control value is selected.
Purchase order #	Alphanumeric, 15 positions; optional. The customer's purchase order number. Use this field to advance to the Scan Orders by Purchase Order Number screen. See Order Scan Screens in Order Maintenance.
Tracking #	Alphanumeric, 15 positions; optional. The number assigned by the shipper to track the shipment. This number is stored in the Manifest Upload Audit table. Enter a full or partial tracking number to advance to the Scan by Tracking # screen. If your entry is an exact match to a tracking number for an order, you advance directly to the order. See Order Scan Screens in Order Maintenance. Alphanumeric, 30 positions; optional.
Customer scans	
Match code	A code the system assigns to each customer, based on elements of the customer's name and address. The system uses the match code to identify duplicate or fraud customers on the system. Use this field to advance to the Scan Orders by Match Code screen. See Order Scan Screens in Order Maintenance. You can scan for customers across companies with the match code field if cross-company scanning is set up. See Cross-company Scanning. Alphanumeric, 15 positions; optional.

Field	Description
Postal code	The postal or zip code for the customer's address. Enter a full or partial code to advance to the Scan Sold To by Postal Code/Company screen. This screen lists all customers by postal code in ascending (lowest to highest) numeric sequence, beginning with the code you entered. If you enter a postal code, last name, and first name, you advance to the Scan Customer Sold To by Postal Code screen, which lists all customers alphabetically beginning with the postal code you entered. See Customer Scan Screens in Order Maintenance. <i>Scan length:</i> The Postal Code Scan Length (F61) system control value controls how many characters of the postal code to use when searching for a customer. See that system control value for a discussion. You can scan for customers across companies with the postal code field if cross-company scanning is set up. See Cross-company Scanning. Alphanumeric, 10 positions; optional.
Last name	The sold-to customer's last name. Enter a full or partial name to advance to a Scan Cust Sold To By Last Name screen, which lists all customers alphabetically beginning with the name you entered. You can also include a full or partial first name along with a full (not partial) last name to restrict the scan further. See Customer Scan Screens in Order Maintenance. Alphanumeric, 25 positions; optional.
First name	The sold-to customer's first name. Enter the last name, first name, and postal code to advance to the Scan Customer Sold To by Postal Code screen, which lists all customers alphabetically beginning with the postal code you entered. You can also enter just the full (not partial) last name and full or partial first name to advance to the Scan Cust Sold To By Last Name screen. See Customer Scan Screens in Order Maintenance.
 Note: First name must be used in conjunction with Postal code, Last name or with just Last name for scanning. You cannot scan on first name alone.	
Company name	Alphanumeric, 25 positions. The name of the company placing the order. Use this field to advance to the Scan Customer Sold To by Company Name screen. See Customer Scan Screens in Order Maintenance. Alphanumeric, 30 positions; optional.

Field	Description
Phone number	The customer's daytime, evening, or third (fax or mobile) telephone number. Use these fields to advance to the Scan Customer Sold To by Phone Number screen. Customer Scan Screens in Order Maintenance. You can define a telephone number format for each country to map to the phone numbers operators enter into the system. See Setting Up the Country Table (WCTY).
	 Note: Your entry should include any formatting specified by the telephone number format for the country; for example, if the telephone number format for the United States is (111) 111-111, your entry should include the parentheses and hyphen.
	Alphanumeric, 14 positions; optional.
E-mail Address	An email address for the customer. When you enter a full or partial email address, you advance to the Scan Customer by E-mail Address screen, where you can scan by any email address on file for a customer. This field is not case sensitive; an email address of <i>abc@example.com</i> matches an entry of <i>ABC@EXAMPLE.COM</i>, and vice versa. See Customer Scan Screens in Order Maintenance.
	Alphanumeric, 50 positions; optional.
Other scans	
Salesrep # (Sales representative number)	A code that identifies a sales representative from your company who entered or obtained the order. Numeric, 7 positions; optional.
Batch #	A number that identifies a group of orders within an order batch. Use this field to advance to the Scan Orders by Batch Number screen. Order Scan Screens in Order Maintenance. Numeric, 5 positions; optional.
Invoice #	The number assigned by the system to the customer's bill. Use this field to advance directly to the Work with Order Screen in Order Maintenance. Numeric, 7 positions; optional.
Country	The code representing the customer's country. Country codes are defined in and validated against the Country table; see Setting Up the Country Table (WCTY). Use this field to advance to the Scan Customer Sold To by Country screen. See Customer Scan Screens in Order Maintenance. Alphanumeric, 3 positions; optional.

Screen Option	Procedure
Enter orders	Select <i>Enter Orders</i> to advance to the order entry <i>Select Customer Sold To For Order Screen</i> .
Check item availability	Select <i>Item Availability</i> . See <i>Inquiring into Item Availability (DIAV)</i> .

Advancing from Customer and Order Scan Fields

Process: Depending on the field(s) you use for scanning at the *Order Maintenance Selection Screen*, you advance to a subsequent customer or order scan screen.

You advance directly to the *Work with Order Screen in Order Maintenance* when you scan from the *Order #* or *Invoice #* fields, or from the *Tracking #* if your entry is an exact match.

Orders that are not eligible for maintenance: You cannot maintain an order if its status is *Suspended* or *Error*, if it is a canceled pre-order quote, or if it is a store pickup order:

- Use batch order entry to work with orders in *Suspended* or *Error* status. See *Introducing Order Batches* for more information.
- If you select a store pickup order, the only available option is to cancel the entire order, provided you have sufficient authority. See *Store Pickup Orders* for an overview, and see *Canceling a Store Pickup Order* for details.

Customer Scan Screens in Order Maintenance

Customer scan screens display a list of customers matching your search criteria from the *Order Maintenance Selection Screen*. For example, if you entered a *Postal code* at the initial screen, you advance to a customer scan screen displaying customers sorted alphanumerically by postal code, starting with your entry. You can select a customer at customer scan screen in order to advance to an order scan screen.



Note:

Customer scan screens do not display ghost customers, identified by the setting of the *Ghost* flag. These are customers who were merged during a merge/purge process.

How to advance from a customer scan field: Select a record to advance to an *Order Scan Screens in Order Maintenance*, where you can select an order for maintenance.

Order Scan Screens in Order Maintenance

Order scan screens display a list of orders matching the search criteria you entered at the *Order Maintenance Selection Screen*. For example, if you entered an *Order cross ref #* at the initial screen, you advance to a scan screen displaying orders sorted alphanumerically by order cross reference number, starting with your entry.

Ghost customers: If you enter the customer number of a ghost customer, the scan screen does not display any orders; this is because a merge/purge has assigned any orders using that customer number to the “target” customer. You can identify a ghost customer by the setting of the *Ghost* flag.

Choose an order by selecting *Select* for it. You advance to the *Work with Order Screen in Order Maintenance*.

Customer Note Window

A customer note pop-up window may open when you select an order for maintenance.

About this window: This window opens because of information you entered in a customer note for the sold-to customer on the order (*not* a recipient on the order). Specifically, you have entered a customer note that was flagged to display automatically when you select the customer for order entry or order maintenance.

Window contents: This window includes:

- [Sold-to customer](#)
- customer name or [Company name](#)
- customer note text

For more information:

- setting up a customer note type that will display automatically when you select a customer for order entry or maintenance: [Working with Customer Note Types \(WNTY\)](#)
- working with customer notes: [Edit Customer Notes Screen](#)

PayPal Warning Window

A PayPal Warning window opens when you select an order for maintenance that contains a pay type with *PPL* (PayPal) defined as the authorization service and deposit service.

This window indicates that you should not make any changes to the order that would increase the order total. When you generate a pick slip for an order that contains a PayPal payment, the system validates that the amount required to generate the pick slip does not exceed 115% or \$75.00 of the original authorization amount that was received from PayPal during web storefront processing.

Order contains a PayPal pay type. Activities that will increase the order total - adding a line, increasing a price, should not be performed.

Select *Exit* at this window to continue to order maintenance.

Warning: Order Locked Window

When a user is entering an order or selects an order for maintenance, or when a function is updating an order, Order Administration locks the order by entering the user's login ID or the function name in the User field in the Order Header table. If the User field is not cleared afterward, the order remains locked. For example, an order might be locked because the user's session ended unexpectedly.

- If the order is locked, the system displays the Warning: Order Locked window. This window indicates the name of the user or process using the order, based on the current entry in the User field in the Order Header table.

To unlock the order, use the [Unlocking a Stranded Order or Batch \(MULO\)](#) menu option.

Cannot Maintain Order Window

This window opens if you select to maintain an order that is in a suspended or error status or whose order type identifies the order as a canceled pre-order quote. In any of these situations, you cannot maintain the order.

See [Entering Pre-Order Quotes](#) and [Maintaining Quotes in Order Maintenance](#) for more information about pre-order quotes.

Maintaining Retail Pickup or Delivery Orders from Order Orchestration

If you have authority under the [Maintain Brokered Fulfillment Orders \(B20\)](#) secured feature, a window displays a warning message when you select an open or held delivery or retail pickup order for maintenance, indicating that maintenance options are limited.

Secured feature: If you do not have authority under the *Maintain Brokered Fulfillment Orders (B20)* secured feature, you cannot maintain a delivery or retail pickup order received from Order Orchestration.

Possible updates: You might need to maintain a retail pickup or delivery order to:

- Sell out an item that is no longer available: Order Administration sends a reject request to Order Orchestration. Order Orchestration then attempts to find another location to fulfill the order unless the order has already reached the Search retries maximum specified in Order Orchestration.
- Cancel an item that the customer no longer wants: Order Administration sends a cancel request to Order Orchestration, indicating that the order should not be fulfilled. Order Orchestration does not reassign a canceled order to another fulfilling location.

Caution: Certain updates are not appropriate for these orders, such as:

- changing payment information. When the system creates retail pickup or delivery orders, it uses the [Order Broker Payment Type \(K98\)](#). This is typically a “dummy” payment type if the order is fully paid in the originating retail location.
- changing the shipping address:
 - A retail pickup order ships to the originating store location, so you should update the shipping address only if the address for the originating store changes.
 - A delivery order ships to the customer. You should change the shipping address only after communicating with the originating location, so that the shipping address recorded for the order is consistent.

Returns: If the *Suppress Returns for Retail Pickup/Delivery (L88)* system control value is:

- selected, you cannot process a return against a retail pickup or delivery order or add a negative additional charge
- unselected, you can process a return against a retail pickup or delivery order; however, the *Order Broker Payment Type (K98)* is deactivated after shipment, so you would then need to enter a new payment method in order to process the related refund.



Note:

Regardless of the setting of the *Suppress Returns for Retail Pickup/Delivery (L88)* system control value, you cannot enter a line with a negative quantity or apply a discount against a shipped order line on a retail pickup or delivery order.

Prohibited updates: Other updates are not allowed, such as:

- adding an item
- changing the ordered quantity

See the [Order Orchestration Integration](#) for background.

Maintaining a Ship-for-Pickup Order

If the [Payment at POS for Ship for Pickup Orders \(L60\)](#) system control value is selected and you are maintaining a ship-for-pickup order, you cannot:

- process a return against an entire ship-for-pickup order or a line on a ship-for-pickup order
- enter a negative additional charge
- enter a line with a negative quantity
- apply a discount to a closed order line

These restrictions apply regardless of whether the order type matches the [Order Type for Special Orders \(L15\)](#).

See the [Order Orchestration Integration](#) for background.

ChannelAdvisor Warning Window

An error message window opens when you select an order for maintenance if its order type matches the [ChannelAdvisor Order Type \(L90\)](#). Changes to orders you process through the ChannelAdvisor integration are not sent to ChannelAdvisor. See [ChannelAdvisor Integration Overview](#) for background.

Work with Order Screen in Order Maintenance

Purpose: You use this screen in both order entry and order maintenance. The updates you can perform in order maintenance, including any conditions or restrictions, are described in [Field Updates](#). See [Entering Orders](#) for field descriptions.

Quote maintenance activities: See [Maintaining Quotes in Order Maintenance](#) for more information on the maintenance activities you can perform on a pre-order quote.

Retail pickup or delivery orders: See [Maintaining Retail Pickup or Delivery Orders from Order Orchestration](#) for a discussion on maintaining these orders.

Oracle Retail Customer Engagement customer integration: When you use the Oracle Retail Customer Engagement customer integration, if you update the customer's name or address information in order maintenance, Order Administration sends an update to Oracle Retail Customer Engagement so that the customer records in the two systems are synchronized. See the [Customer Engagement Customer Integration](#) for more information.

How to display this screen:

- Select an order through the [Order Maintenance Selection Screen](#) or a subsequent scan screen.
- Select *Maintain* at the [Order Inquiry Header Screen](#) or [Order Inquiry Detail Screen](#).

Field Updates

This table identifies the fields on the Work with Order screen that you can change, and discusses the conditions and restrictions for updating these fields, if any. A restriction is an action that the program allows or does not allow. A condition is a situation under which a certain action is allowed. The condition or restriction column is blank for a field if you can update the field under any condition.

Field Update	Result	Condition or Restriction
Hold reason	The system places the entire order on hold; the order is not eligible for pick slip preparation when you enter a user-defined hold code.	You can set authority to release an order from hold at the user or user class level. This can be a blanket authority for all order hold reasons, or can be specific to individual reason codes. See Establishing Order Hold Reason Codes (WOHR). You cannot set authority on placing on order on hold, only releasing.
Calc freight	The system suppresses all freight charges for new items (including freight and additional freight) when you deselect this field. If service charges by ship via would normally apply, the system suppresses these as well.	Conditions: The system does not calculate freight for new items you add to the order when this field is <i>unselected</i>; the system charges the customer any freight previously calculated for existing order detail lines if using a line-level freight method. The Recalculate Freight Default (F62) system control value controls the default setting of this field.
Attention	The system prints/does not print an attention line on the pick slip when you enter or delete a name in this field.	Changes to this field are not sent to Order Orchestration.
Mail	The system updates the Sold-to Customer record automatically when you change this value. A value of <i>N</i> indicates that the customer does not want to receive catalog mailings; use this to exclude this customer from any house lists you generate.	
Rent	The system updates the Sold-to Customer record automatically when you change this value. A value of <i>N</i> indicates that the customer does not want you to sell his or her name to other companies for their mailing lists; use this to exclude this customer from any house lists you generate.	

Field Update	Result	Condition or Restriction
Name and Address	The system updates the Sold-to Customer record automatically when you change any customer address information, including: the prefix or suffix, first, middle, or last name, company name, street address, postal code, city, state, country, delivery code, day or third (fax or mobile) telephone number. The system revises the Sold-to customer's match code based on the changes to the name and address.	Sold To/Bill To Link A pop-up window displays when the Sold-to customer is linked to a permanent Bill-to account. The window allows you to apply the changes made to the Sold-to address to the Bill-to address as well. See Display/Update Bill to Screen. Tax and Freight Recalculates the tax and freight on the order. VAT and Tax-Inclusive Pricing If changing the shipping address on the order affects whether the order is subject to VAT and tax-inclusive pricing, the system will reprice any open lines based on this change. For example, if you have set up an offer price for an item of \$1.00, and a tax-inclusive offer price of \$1.50, this item will be repriced from \$1.00 to \$1.50 if you change the shipping address from a VAT-exempt state to a non-VAT-exempt state. This repricing does not take place automatically for any line with a price override reason code, including incentive items, promotional items., etc. See Setting Up Order Entry Values for more information on VAT and tax-inclusive pricing. Order Orchestration Interface If you change these fields in the shipping address for an order which includes an open drop ship PO line processed through the Order Orchestration Drop Ship Manager interface, Order Administration sends the updated address information to Order Orchestration. See Order Orchestration Drop Ship Integration. Shipping restrictions: If one or more items on the order is restricted from being shipped to the state or country of the ship to address, a message indicates: One or more items on the order line are restricted to new Shipping country/state. See Entering Additional Item Information , for information on item/state restrictions.
M/F	The system updates the Sold-to Customer record automatically when you change this value. A value of <i>M</i> indicates that the customer is male; a value of <i>F</i> indicates that the customer is female.	

Field Update	Result	Condition or Restriction
Delivery	The system uses a different rate table to calculate shipping charges if U.P.S. is the shipper when you change this value to/from business) or residence. A third value, no distinction is valid only for shippers other than U.P.S. The system updates the Sold-to Customer record automatically when you change this value.	Condition: The value in the Delivery field applies only to shippers that use rate tables to calculate shipping charges, such as UPS. Restrictions: You cannot change this value to <i>No Distinction</i> if U.P.S. is the shipper. (The system identifies the shipper as U.P.S. if the Type field in the Ship Via table is <i>unselected</i>. See Working with Ship Via Codes (WVIA) for more information.)
Phone numbers	The system updates the Sold-to Customer record automatically when you change these values.	Restriction: You cannot delete all phone numbers if the system control value Require Phone Number in Order Entry/Order Maintenance (H01) is selected. Order Orchestration Interface If you change the Day or Primary phone field for a sold to or ship to address on an order which includes an open drop ship PO line processed through the Order Orchestration Drop Ship Integration, Order Administration sends the updated address information to the integrated system.
Email address	See Email Address Updates through Order Maintenance .	
OptIn Customer class	The system updates the Sold-to Customer record automatically when you change this value.	Conditions: <i>Required?</i> The Require Customer Class (H85) system control value defines whether this field is required. Restrictions: <i>Secured?</i> The Maintenance of Customer Class Field (B07) secured feature defines whether you can enter or maintain the customer class field at this screen.

 Note:

If the [Require Customer Class \(H85\)](#) is selected and the customer does not have a customer class code assigned, a user who does not have authority based on the [Maintenance of Customer Class Field \(B07\)](#) secured feature will not be able to maintain the order.

Field Update	Result	Condition or Restriction
Source	The system deletes the dollars and number of units posted to the original source code and posts this information to the new source code.	Conditions: You cannot change the source code if any shipments have been made on the order. Restrictions: The source code override at the order header level must use the same freight and pricing methods. The system does not update the source code at the detail line level when you update the source code on the order header.
Salesrep#	The system updates sales reports based on your entry of a different sales representative number. New items are booked to the new sales representative number.	Sales representatives are defined in and validated against the Salesman table. See Working with Sales Representatives (WSLS). Restrictions: The Maintain Sales Rep # During Order Maintenance (B22) secured feature controls whether you can update the Salesrep field on the Work with Order screen in Order Maintenance. If you do not have authority to this secured feature, the Salesrep field is display-only.
Ship via	All open (unshipped) items ship by the new shipper. A pop-up window opens confirming whether you want to recalculate freight charges for the order. Note: If you change to an express bill Via, you must manually authorize active credit card pay methods. Reviewing eligible ship vias and optionally selecting an override You can prompt on this field to advance to the Valid Ship Vias for Window, where you can review valid ship vias for the order, including their overall shipping charges and expected delivery dates; optionally, you can select an override ship via.	Condition: All open (unshipped) items ship by the new shipper. Restrictions: The shipper update on the order header screen affects all items except those with a ship via override. Express bill: You cannot change the ship via to an express bill shipper if any order lines are reserved, or if there is a printed drop ship item. Item ship via override: If item ship via overrides exist, the system verifies that the new shipper is eligible to ship the open items remaining on the order. If the new shipper is not eligible to ship an item on the order, the Ship Via Overrides for Item Window displays, requiring you to select a valid shipper for that item. See Working with Item Ship Via Overrides for more information on defining item ship via overrides. Best way shipper: If you change the ship via to the Best Way Ship Via for Auto-Assignment (J67) and the Display Alternate Shipping Charges by Via Window in OM (I02) system control value is set to Y, the system assigns the “best way” ship via with the lowest overall shipping charges to the order. See the Best Way Ship Via for Auto-Assignment (J67) system control value for more information.

Field Update	Result	Condition or Restriction
Gift	When you select this field, you are prompted to enter the shipping address of the gift recipient. The system suppresses prices on the pick slip for open (unshipped) items and prints a Gift Acknowledgment Card for the Sold-to customer when the gift order ships.	Condition: The prices for all open (unshipped) items do not print on the pick slip if this field is selected.
Priority	Entry of a different reservation priority changes the priority of open (unshipped) items on this order for backorder or order reservation.	Condition: All open (unshipped) items are assigned this reservation priority. The reservation priority is used only by the Evaluate Backorders program and does not affect the Immediate Reservation program.
Warehouse	If you <i>add</i> or <i>change</i> the warehouse, the system: 1. Applies the new warehouse code to each open line on the order. 2. Removes the existing inventory reservations for the open order lines on the order that do not contain a printed quantity. 3. Attempts to reserve the items on the order in the new warehouse specified. If an item is not available in the warehouse specified, the system assigns this warehouse as the backorder warehouse for the unreserved quantity of the item on the order line. If you <i>remove</i> the warehouse, the system: 1. Removes the warehouse code assigned to each open line on the order. 2. Removes any existing inventory reservations for the open order lines on the order that do not contain a printed quantity. 3. Attempts to reserve the items on the order using regular reservation logic.	

Field Update	Result	Condition or Restriction
Associate	Updating to Controls whether the customer is eligible for associate (member) pricing discounts on new items on the order. The system updates the Sold-to Customer record automatically when you change this value.	Condition: If you select this value, only new items are eligible for associate pricing. Restrictions: The Change Associate Customer Flag (B10) secured feature controls whether you can change this setting; if you prohibit access to this feature, the system displays an error message if you try to change the value: Not authorized to change Associate Customer.
Discount %	Entering a discount percentage instructs the system to apply a merchandise discount against discountable items that you add to the order. The discount is not applied to existing items.	Condition: Only new items are eligible for the discount percentage.
Est frt	You can enter an estimated freight charge for inquiry purposes only if you change the source code to one that uses the Actual (A) freight method.	
Auto can B/O	Indicates whether the system automatically cancels any backordered items after the first shipment. The system cancels any unshipped lines during Confirmation.	Condition: If you select this field, all open (unshipped) items will be canceled.
Cancel date	This is the last date on which the customer will accept receipt of this order. Orders still open on this date are printed on the Order Cancellation list; Customer Service uses this list to contact the customer and, if necessary, cancels the order through Order Maintenance.	Condition: If you enter a date in this field, only open (unshipped) items will be affected by the cancel date.
Arrival date	This is the date on which the customer wants to receive this order.	Restrictions: The system updates each open (unshipped) item on the order automatically with the new arrival date.
Tax code	This code controls the taxable status of the order.	Conditions: The new tax code controls how the system calculates tax only for new item additions to the order.
Tax identification	The system requires a tax identification number if the Tax code is set to reseller (R) or exempt (E); otherwise, optional.	
PO#		

Screen Option	Procedure
Work with items on the order	Select <i>Detail</i> to advance to the Work with Order Lines Screen .
Work with payment methods on the order	Select <i>Pay Methods</i> to advance to the Enter Payment Methods Screen in Order Maintenance .
Add or change a customer ship to for the order	Select <i>Ship To</i> to advance to the Change Customer Ship To Screen (Using, Changing, or Excluding a Shipping Address) , the Select Customer Ship To Window (Scanning for a Shipping Address) , or the Create Customer Ship To Screen , depending on whether a ship-to customer already exists for the sold-to customer or the order.
Work with the bill-to customer for the order	Select <i>Bill To</i> to advance to the Select Customer Bill To Window , Create Customer Bill To Screen , or the Change Customer Bill To Screen (Selecting, Changing, or Excluding a Billing Account) , depending on whether a bill-to customer already exists for the sold-to customer or the order.
Review or work with order messages	Select <i>Messages</i> to advance to the Work with Order Messages Screen .
Accept or reject your changes to the order	Select <i>Accept Order</i> to accept your changes to the order, or select <i>Reject Order</i> to exit the order without saving your changes. See Order Maintenance Processing for information on the updates the system performs when you Select <i>Accept Order</i> .
Accept the changes to the order and add a recipient customer	Select <i>Add Recipient</i> to accept the changes to the order and enter or select a new order recipient. See Adding a Recipient Order in Order Maintenance .
Review or work with an order-level ship-to address	Select <i>One Time Ship To</i> to advance to the Change or Create One Time Ship To Address Screen .
Alternate between the sold-to customer's and the recipient's name and address	Select <i>Sold To/Recipient</i> to clear the current customer's information from the screen and display the recipient's information. See Alternating Display of Sold-to/Recipient Addresses .
Cancel the entire order	Select <i>Cancel Order</i> to display the Enter Cancel Reason Window . For regular orders, see Canceling an Order through Order Maintenance . For quotes, see Cancelling a Quote through Order Maintenance .
Work with or review order-level additional charges	Select <i>Additional Charges</i> to advance to the Change Additional Charges Screen .
Work with or review an expanded address	Select <i>Expand Address</i> to advance to the Expand Name/Address Screen .
Review additional order options	Select <i>More Options</i> to advance to the Display More Options Screen .
Review or work with additional order properties	Select <i>Properties</i> to advance to the Work with Order Ship to Properties Screen .
Display a summary of items and order totals	Select <i>Summary</i> to advance to the Display Order Summary Screen .

Changing Item Detail Line Information in Order Maintenance

Purpose: Use this screen to:

- review information about items on an order
- make changes and additions
- cancel a line
- process returns or exchanges
- review order line history

Restrictions on changing an order line: You cannot:

- Update an item in any way if a pick slip has been printed. You must void and reprint the pick; see [Reprinting and Voiding Pick Slips \(WVRP or WSVP\)](#).
- Change an item if shipments have been made against the line or the line has been canceled.
- Change, cancel, delete, or sell out a set component item if you do not have the required authority under the [Set Component Maintenance \(J01\)](#) secured feature. See that secured feature for more information.
- Change an item on a retail pickup or delivery order from the Order Broker. See the [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for more information.
- Change the Drop ship setting for an existing order line.

See [Working with Items on the Order](#) for field descriptions.

Quote maintenance activities: See [Maintaining Quotes in Order Maintenance](#) for more information on the maintenance activities you can perform on a pre-order quote.

In this topic:

- [Work with Order Lines Screen](#)
- [Work with Order Line Screen](#)
- [Discount Price Window \(Applying a Discount to an Item\)](#)
- [If You Use Price Tables](#)
- [Differences Between Order Entry and Order Maintenance](#)
- [Ineligible Premiums Window](#)
- [Maximum Order Line Quantity/Value](#)
- [Confirm Quantity/Line Value Window](#)

Work with Order Lines Screen

How to display this screen: Select OK at the [Work with Order Screen in Order Maintenance](#).

About this screen: See the [Work with Order Lines Screen \(Adding Items to the Order\)](#) for information about this screen, including field descriptions. See this table for options and directions on where to go for more information.

Screen Option	Procedure
Change a line	Select <i>Change</i> for an item to advance to the Work with Order Line Screen, where you can change detail line information. This option is available only if the line is in open or held status and does not have a printed quantity.  Note: Selecting <i>Change</i> for a set component item is controlled by the <i>Set Component Maintenance (J01)</i> secured feature. If you do not have the required authority, the system displays an error message: Not authorized to change, delete, cancel, or sell out a set component.
Cancel a line	Select <i>Cancel</i> for an item to advance to the Enter Cancel Reason Window.  Note: Selecting <i>Cancel</i> for a set component item is controlled by the <i>Set Component Maintenance (J01)</i> secured feature. If you do not have the required authority, the system displays an error message: Not authorized to change, delete, cancel, or sell out a set component.
Review open purchase orders	Select <i>POs</i> for an item to advance to the Display Open Purchase Orders Screen .
Review availability	Select <i>Availability</i> for an item to advance to the Item Availability Screen .
Review additional items coordinated with the item for cross-selling purposes	Select <i>Coordinates</i> for the item to advance to the Display Coordinate Items Window if any coordinates are linked with the ordered item.
Apply, delete, or review coupon discounts	Select <i>Coupons</i> for an item to advance to the Coupon Discount Window . You can add or delete a coupon only if none of the items on the order have printed pick slips or are in closed status.

Screen Option	Procedure
Apply a discount to an item	Select <i>Discount</i> for an item to display the Discount Price Window (Applying a Discount to an Item). You can use this window to apply a discount to an item in a dollar amount or discount percentage. Only shipped, unreturned items are eligible for these discounts.  Note: To ensure the background async jobs update order related tables correctly, do not use this option against a shipped, unreturned order line in the same session that you add a new order line.
Review item history	Select <i>History</i> for an item to advance to the Display Order Line History Screen .
Place the item on hold	Select <i>Hold</i> for an item to place it on hold. Only open, unprinted order lines are eligible to be held. The line status changes to held (<i>H</i>) and the item will not be eligible for pick slip preparation until you release the line. Access to this option is controlled by the O/E Hold, Release Order Lines (A46) secured feature.
Search for the item across warehouses and stores in external systems	Select <i>Merchandise Locator</i> for an item to advance to the Merchandise Locator Search Window (Searching for an Item) . See Merchandise Locator Process Overview for more information.
	 Note: This option is available only if the Use Merchandise Locator (I38) system control value is <i>selected</i>. Otherwise, the screen displays an error message: Merchandise Locator is not enabled.
Work with order line messages	Select <i>Messages</i> for an item to add, change or display order line messages. See Work with Order Line Messages Screen for more information.
Review quantity pricing	Select <i>Prices</i> for an item to advance to the Display Quantity Pricing Window .

Screen Option	Procedure
Release a held item	Select <i>Release</i> for an item to release it from hold. Only held items (status = <i>H</i>) are eligible to be released. The line status changes to open (blank) and the item is now eligible for pick slip preparation. If the item was placed on hold through Processing Auto Soldout Cancellations (MASO) , the system deletes the item record from the Order Hold Detail table; see Working with Held Detail Lines (WOHD) . Access to this option is controlled by the <i>O/E Hold, Release Order Lines (A46)</i> secured feature.

 Note:

Order lines can also be put in hold status because of a special handling format. See [Putting a Line on Hold through a Special Handling Format](#) for a discussion.

Return an item	Select <i>Return</i> for a shipped item to return or exchange it. See Returning and Exchanging Items in Order Maintenance .
Sell out an item	Select <i>Sell Out</i> for an item to sell it out. The status of the line changes to <i>S</i> and the system recalculates the tax on the order. Only open or held, unreserved lines are eligible to be soldout.

 Note:

Selecting *Sell Out* for a set component item is controlled by the *Set Component Maintenance (J01)* secured feature. If you do not have the required authority, the system displays an error message: Not authorized to change, delete, cancel, or sell out a set component.

Add or change special handling information	Select <i>Special Handling</i> for an item to advance to the Work with Special Handling Screen or Work with Special Handling Screen. This option is available only for open or held items without a printed quantity 1. This option is not available if the additional charge code used for the special handling format is suppressed; see Special Handling Overview for a discussion. 2. If you add a special handling format flagged to hold the order line, the system changes the order line status to held; similarly, if you remove a special handling format flagged for hold, the system releases the order line from hold. See Putting a Line on Hold through a Special Handling Format for more information.

Screen Option	Procedure
Accept the changes to the order	Select <i>Accept Order</i> . See Order Maintenance Processing for information on the updates the system performs when you select <i>Accept</i> .
Reject the changes to the order	Select <i>Reject Order</i> . When you reject an order, the system evaluates the order to determine if it qualifies for pick slip preparation; see Preparing Orders for Pick Slip Generation and Applying Pick Slip Preparation to an Order .
Accept the order and add a recipient	Select <i>Add Recipient</i> . See Entering Orders .
Add an item	Select <i>Add Line</i> to advance to the Work with Order Line Screen to add an item. You can also add an item by entering the item information in the empty order line. See Adding an Item in Order Maintenance .
Add or change additional charges	Select <i>Additional Charges</i> to display the Enter Additional Charges Window .
Cancel the order	Select <i>Cancel Order</i> . See Canceling an Order through Order Maintenance .
Enter or work with messages about the order detail line to optionally print on the pick slip and/or invoice or use for internal reference	Select <i>Messages</i> for the item to advance to the Work with Order Line Messages Screen .
Display additional options	Select <i>More Options</i> to advance to the Display More Options Screen .
View or work with order header information	Select <i>Order Header</i> to return to the Work with Order Screen in Order Maintenance .
Review order history	Select <i>Order History</i> to advance to the Display Order History Screen .
Work with payment information	Select <i>Pay Methods</i> to advance to the Enter Payment Methods Screen in Order Maintenance .
Review item relationships	Select <i>Relationships</i> . See Working with Items on the Order .
Reprice the order and review premium items	Select <i>Reprice</i> . This option is available: • If You Use Price Tables. • If you are maintaining a quote; see Maintaining Quotes in Order Maintenance. Otherwise, an error message displays when you select <i>Reprice</i> : Selected function is not valid for current processing mode (Maintain).
Process returns	Select <i>Return Order</i> to advance to the Return/Exchange Item screen. See Starting the Return Process .
Scan order lines	Select <i>Scan Order Lines</i> to advance to the Scan Order Lines Screen .

Work with Order Line Screen

Purpose: Use this screen to review or change detail information about an item on an order, including pricing and status.

How to display this screen: Select *Change* for an item at the [Work with Order Lines Screen](#). This option is available only for open or held order lines without a printed quantity.

**Note:**

Selecting *Change* for a set component item is controlled by the *Set Component Maintenance (J01)* secured feature. If you do not have the required authority, the system displays an error message: Not authorized to change, delete, cancel, or sell out a set component.

See [Adding Different Types of Items to the Order](#) for more information on the processing the system performs for different types of items.

Field updates: This table identifies the fields on the Work with Order Line screen that you can change, and discusses the conditions and restrictions for updating these fields, if any.

A restriction is an action that the program allows or does not allow. A condition is a situation under which a certain action is allowed. The condition or restriction column is blank for a field if you can update the field under any condition.

Field Update	Result	Condition or Restriction
Offer	When you update the offer, the system may reprice the item, determine whether the item is eligible for special handling or gift wrapping, validate the type of special handling, and update the special handling and gift wrapping charges, if any. The system ensures that the source code assigned to the item is valid for the new offer.	Conditions: You cannot change the offer if any shipments have been made on the line. Restrictions: The offer override at the line level must use the same freight and pricing methods.
Qty	Increases or decreases the number of units ordered.	Condition: The system displays a pop-up window for you to enter a cancel reason code if you decrease the quantity ordered of an item. Additionally, you must specify whether to recalculate freight and refund the customer the freight difference resulting from the refund. You cannot change a positive quantity to a negative quantity on this screen, or vice versa. See Increasing the Quantity Ordered in Order Maintenance, and Canceling an Item in Order Maintenance.

Field Update	Result	Condition or Restriction
Price	An update to this field results in a price override to the item. If the Display Order Line Discount Messages (F01) system control value is <i>selected</i>, a message displays describing the discount for each item sold at less than the offer price, and the price itself is highlighted in reverse color. Any type of price override or repricing method that produces a price lower than the regular offer price is considered a discount.	Restriction: The Price Overrides (A23) secured feature controls whether you can update the price defined for the order line; if you do not have authority to this secured feature, the Price field is display-only. User and user class security determine whether you can perform a price override. You can also define a maximum percentage operators can discount an item by entering a percentage in the Price Override Limit Percent (E55) system control value. The Allow Negative Prices in Order Entry (E97) system control value controls whether you can enter a negative item price in order maintenance as well.
N/C	The system does not charge for this item when you <i>select</i> this field.	Restriction: The Price Overrides (A23) secured feature controls whether you can update the no charge flag for the order line; if you do not have authority to this secured feature, the No charge field is display-only. User and user class security determine whether you can sell an item at “no charge.” Condition: You must enter a price override reason code in the Ovr field if you give the item to the customer at no charge.
Ovr	The system tracks who performed the price override or who sold the item at “no charge” when you enter an override reason code.	Restriction: The Price Overrides (A23) secured feature controls whether you can override the item price; if you do not have authority to this secured feature, the Price override reason code field is display-only.
Frt	Controls whether the system recalculates freight for the item based on changes to its quantity or price.	Condition: The Recalculate Freight Default (F62) system control value controls the default setting of this field, but you can override this default.
Offer price	The price of the item in the catalog, before applying any additional discounts or repricing. If the order was subject to VAT and tax-inclusive pricing, in which any tax is included in the Hidden tax field rather than the Tax bucket on the order, the offer price presented here is the tax-inclusive offer price. Updating this field does not change the selling price of the item.	Restriction: The Price Overrides (A23) secured feature controls whether you can update the offer price for the order line; if you do not have authority to this secured feature, the Offer price field is display-only.

Field Update	Result	Condition or Restriction
Ship via	The item will ship by the new shipper.	Conditions: You can change an item on an order to express bill by entering an express bill ship via code. When you express bill an item, the item immediately goes through billing. A pick slip does not print and no shipments occur for the item. Restrictions: An error message indicates if you change an item on an express bill order to a non-express bill shipper: Ship Via must be an Express Bill.
Arr date	This is the date when the customer wants to receive the order.	
Source	The system deletes the dollars and number of units posted to the original source code and books this information to the new source code.	Conditions: You cannot change the source code if any shipments have been made on the item. Restrictions: The source code override at the line level does not affect the freight and pricing methods, which are defined by the original source code.
C/G	The system does not perform pick slip preparation for items on the order with the same coordinate group number unless inventory is available for all of the items.	
Freight	The system uses this freight charge for the item.	Conditions: The system allows you to perform a freight override for the item only if the source code for the item uses a line level freight method of: <i>Flat Rate/Item</i>, <i>Flat Rate/Quantity</i>, <i>Flat Rate/Item</i>, or <i>Weight</i>.
G/W	<i>Selected</i> indicates that the item should be gift wrapped.	Condition: The item/offer or SKU/offer record determines whether the item is eligible for gift wrapping.

Field Update	Result	Condition or Restriction
S/H code	This code determines the type of personalization that must be performed on the item, such as monogramming, engraving, altering, etc. See Special Handling Overview for more information.	Condition: The item/offer or SKU/offer record determines whether the item is eligible for special handling. <i>Adding special handling for an existing order line:</i> You advance to the Work with Special Handling Screen or the Work with Custom Special Handling Screen if you add a special handling code unless the display of the special handling screen is suppressed, based on the setting of the Suppress S/H window for the additional charge code. Adding special handling also puts the order line on hold if the special handling format is flagged to do so. <i>Changing the special handling for an existing order line:</i> Enter a different special handling code to advance to the Work with Special Handling Screen or the Work with Custom Special Handling Screen, where you enter the new special handling instructions. If the new code is flagged to hold the order line, this puts the order line on hold; similarly, if the previous code was flagged to hold the order line but the new code is not, this releases the line from hold.

Field Update	Result	Condition or Restriction
		<i>Removing special handling from an existing order line:</i> Select <i>Special Handling</i> to advance to the Work with Special Handling Screen or the Work with Custom Special Handling Screen, where you can select <i>Delete All</i> to remove the special handling from the order line.



Note:

If the line is currently held because of the special handling format, using the steps described above does *not* release the line from hold. You must use the Special Handling option from the [Work with Order Lines Screen](#) to remove the hold.

See [Putting a Line on Hold through a Special Handling Format](#) for background.

Restriction:

If you are adding special handling to an order line, you advance to the related special handling screen as described above. The special handling charge is specified there, either by default from the item/SKU offer or special handling format, or through your entry if you have the required authority. If display of the special handling screen is suppressed as described above, a default special handling charge is added to the order automatically.

This field is display-only if there is already special handling assigned to the order line, unless the special handling is standard format and you have authority under the [Enter or Override S/H Price \(B12\)](#) secured feature.

S/H charge This is the price for the special handling.

Field Update	Result	Condition or Restriction
Warehouse	The item will ship from this warehouse.	When you update the warehouse defined for an order line, the system: - Removes any existing inventory reservations for the order line. - Attempts to reserve the item on the order line in the new warehouse specified. If the item is not available in the warehouse specified, the system assigns this warehouse as the backorder warehouse for the unreserved quantity of the item on the order line.
Cancel date	The date when the item will be canceled if it has not shipped.	
Affect inv	Determines whether the system reduces inventory for the item during order entry and when you ship the item.	Condition: The <i>Non/inv (Non inventory)</i> field in the Item table determines which value defaults in this field.



Note:

If this field is *unselected*, the system will not perform pick slip preparation for the item if all other items on the order are backordered; when one or more backordered items are available, the system will perform pick slip preparation for the non-inventory item as well as for the available item(s).

Restriction:

You cannot change the Affect inventory flag to *N* for a drop ship item: Affect Inventory flag must be *Y* for Drop Ship Items.

Field Update	Result	Condition or Restriction
Priority	Controls the priority of this item for backorder or order reservation.	Condition: The reservation priority is used only by the Batch Reservation or Evaluate Backorders programs and does not affect the Immediate Reservation program.
Cost override	Represents an override to the base cost of the item from the Item record. This override ensures that your gross margin is accurate when you place a special order from your vendor for the customer.	

Discount Price Window (Applying a Discount to an Item)

Purpose: Use this window to apply a discount dollar amount or a discount percentage to a shipped item.

How to display this screen: Select *Discount* for an item at the [Work with Order Lines Screen](#).

A message displays if the item is not eligible for a discount:

Line cannot be discounted -- not shipped or already returned



Note:

To ensure the background async jobs update order related tables correctly, do not a discount against a shipped, unreturned order line in the same session that you add a new order line.

Field	Description
Order #	The number assigned by the system to identify this order. Numeric, 9 positions; display-only.
Ln # (Line number)	The detail line where the item you are applying the discount to is located. Numeric, 3 positions; display-only.
Sts (Status)	The status of the order. Alphanumeric, 9 positions; display-only.
Item and SKU	The name of the item and its associated SKU code. Item: Alphanumeric, 12 positions; display-only. SKU: Alphanumeric, three 4-position fields; display-only.
Quantity (Quantity ordered)	The number of units of the item being ordered. Numeric, 5 positions; display-only.

Field	Description
Extension (Extended price)	The total unit price for this order line. The system uses this calculation to determine the extended price: $\text{unit price} \times \text{quantity ordered} - (\text{units returned} + \text{units canceled}) = \text{extended price}$ The extended price reflects the price of the order line in merchandise dollars before any charges, such as freight, have been applied. Numeric, 20 positions with a 2-place decimal; display-only.
Price	The price of a single unit of the item. The selling price of this item defaults. Enter a different price in this field to apply a price override. Numeric, 13 positions with a 2-place decimal; optional.
Discount % (Discount percent off price)	The discount percentage you are applying to this item. Enter a percentage in this field to apply a percent discount. The percent discount is taken from the dollar amount in the Price field. Numeric, 5 positions with a 2-place decimal; optional.
N/C ("No charge" indicator)	Indicates whether the customer will be charged for this item. Valid values are: <i>No Charge</i> = Item is sold at no charge to the customer. <i>Priced</i> = (Default): Customer will be charged for the item. Optional.
Ovr (Price override reason code)	Represents the reason for overriding the item price or selling the item at no charge. The system uses this code for an audit trail that links the operator who performed the price override or who sold the item at no charge to the order. <i>Secured feature:</i> User and user class security control access to this field. Override reason codes are defined in and validated against the Price Override Reason table. See Establishing Price Override Reason Codes (WPOR). Numeric, 1 position; required if performing a price override or selling item at no charge; otherwise, optional.

Instructions:

- Optionally, enter a dollar amount in the Price field to change the price of the item.
- Optionally, enter a percentage in the Discount percent field to apply a discount percentage to the price of the item. The discount percentage is applied to the dollar amount from the Price field.
- Optionally, select *No Charge* in the No charge field to sell this item at no charge.
- Enter a price override reason code in the Override field if you have changed the price of the item, applied a discount percentage or are selling the item at no charge.
- Select **OK**. You return to the [Work with Order Lines Screen](#) with any changes you have entered applied to the item.

The system reduces the order total based on the discount amount applied. In addition, if a tax override exists, the system uses the tax override rate (the Tax override % field on the [Display Order Detail Screen \(Reviewing Order Line Detail\)](#) to calculate the tax credit amount.

Example: An order is received through the Order API with the following item:

- item quantity = 2

- actual price = 15.00
- extended price = 30.00
- price override = Y
- tax override = Y
- tax amount = 2.00
- GST amount = .50
- PST amount = 1.50

When the order is received, the system calculates the Tax override rate, GST tax override rate, and PST tax override rate in the Order Detail table using the following calculation:

$$(\text{tax amount} / \text{extended amount}) \times 100 = \text{tax override rate}$$

tax override rate: (tax amount 2.00 / 30.00 extended amount) x 100 = 6.67 tax override rate; this rate displays in the Tax override % field on the Display Order Detail screen in Order Inquiry

GST tax override rate: (GST tax amount .50 / 30.00 extended amount) x 100 = 1.67 GST tax override rate

PST tax override rate: (PST tax amount 1.50 / 30.00 extended amount) x 100 = 5 PST tax override rate

In Order Maintenance, you apply a 10% discount to the order line using the Discount Price window after the item has already shipped to the customer. The system calculates the new item totals.

- new price = original price 15.00 - 10% discount = 13.50 new price
- new extended price = new price 13.50 x 2 quantity = 27.00 new extended price
- new tax amount = new extended price 27.00 - 6.67% tax override rate = 1.80 new tax amount
- new GST amount = new extended price 27.00 - 1.67% GST tax override rate = .45 new GST tax amount
- new PST amount = new extended price 27.00 - 5% PST tax override rate = 1.35 new PST tax amount

Billing creates the credit invoice using the new tax amounts. In this example, the credit invoice includes the following tax credits:

- tax credit = .20
- GST tax credit = .05
- PST tax credit = .15

If You Use Price Tables

Purpose: Unlike other pricing methods, price table repricing is effective in Order Maintenance as well as Order Entry. As a result, if you add, cancel, or change the quantity of an item in Order Maintenance, items on the order may be eligible for repricing, or there may be a change in the premium items earned by the order.

**Note:**

If you have printed a pick slip for any items on the order, the order is no longer eligible for any repricing or additional premium items.

Setting up price breaks for items or groups of items is described in [Working with Price Tables \(WPTB\)](#). The Display Premium screen opens in Order Entry or Order Maintenance if the order qualifies for one or more premiums.

Differences Between Order Entry and Order Maintenance

Price table repricing and premium items function differently in Order Maintenance from Order Entry in these respects:

Adding premium items: The system does not increase the quantity of a premium item in Order Maintenance, although it does add new premium items if they are earned by a different item or group of items. For example, if the order formerly qualified for a premium of two of item AB100 because of a group dollar total of \$200 (in which you add one item for each \$100 ordered from the group), and you add group items to the order in Order Maintenance to bring that total to \$300, the system will *not* add an additional AB100 to the order. However, the system *will* add item CC200 if this is a premium earned by a different group of items.

Ineligible Premiums Window

You should select *Premium Items* to review any changes to premium items in Order Maintenance. If the order is no longer eligible for one or more premium items as a result of changes you have just entered, a pop-up window displays the related item(s).

The reason you should select *Premium Items* rather than *Accept* when you use price table pricing is so that you will have the opportunity to remove the premium item from the order, if necessary, before you accept it.

Maximum Order Line Quantity/Value

You can define a maximum quantity or dollar total for individual order lines using these system control values:

- [Maximum Order Quantity \(C60\)](#)
- [Maximum Order Line Value \(E98\)](#)

For example, if you set the Maximum Order Quantity (C60) system control value to 10, the system would validate that you do not enter a single order line with a greater quantity. This might help prevent inaccurate orders due to user error, such as entering 100 instead of 10.

If you set either of these values to 0, the system does not validate whether order lines exceed the maximum.

Secured features: These secured features control the ability to exceed these limits:

- [Allow Maximum Order Line Value Override \(A69\)](#)
- [Allow Maximum Order Quantity Override \(A70\)](#)

Confirm Quantity/Line Value Window

If you have the proper authority, a pop-up window indicates that you have exceeded the maximum quantity or dollar value, and prompts you to accept or cancel.

Select *Accept* at this window to confirm the quantity and add the line to the order or process the change; otherwise, select *Exit* to cancel. If you cancel, the screen displays an error message:

Order Qty of 50 exceeds the maximum allowed in SCV C60.

An error message indicates an excess order line total dollar value:

Order line value of 1000.00 exceeds maximum allowed in SCV E98.

If you do not have the proper authority, the pop-up window does not open and you will not be able to override the maximum.

Adding an Item in Order Maintenance

Purpose: Use the [Work with Order Line Screen](#) to add another item to an existing order and enter item-level overrides. You can also add an item by entering the information on the blank order line in the center of the *Work with Order Lines Screen*. **Ordering a warranty item:** If you enter a warranty item (the Warranty field for the item offer or SKU offer is *selected*), the system:

- adds the item to the order at no charge
- if the [Default Price Override Reason for Warranty Items \(G01\)](#) system control value is *selected*, the system defaults the code to the Price override code field; otherwise the operator must enter a code
- displays an error message if the operator entered a price for the item in the Price field:
Warranty Item - price not allowed

See [Working with Customer Warranty Information \(WCST\)](#).

Ordering a virtual stored value card item: If you order a virtual stored value card item (the SVC type field for the item is V), the system requires you to define an email address in order to send a [Stored Value Card Notification Email](#) to the recipient of the stored value card. If an email address is not defined, the screen displays an error message and you cannot accept the order: Invalid e-mail address/opt in for order containing virtual SVC item. See [Stored Value Card Email Hierarchy](#) for more information on the hierarchy the system uses to send a Stored Value Card Notification to the recipient of the stored value card.

Retail pickup or delivery orders: You cannot add an item to a retail pickup or delivery order from Order Orchestration. See [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for more information.

Enter Add Reason Window

The Enter Add Reason prompts for an add reason code when you add an item if the [Require Reason for Lines Added in Order Maintenance \(D75\)](#) system control value is selected or the Require reason code field for the item offer or SKU offer is selected.

Enter the add reason code that describes your reason for adding this line to the order. The add reason code is a 5-position, numeric field used to define the reason for adding an item to an order in order entry or order maintenance. See [Establishing Add Reason Codes \(WADR\)](#).

The system assigns the next available line number to the item you are adding to the order. The system performs the same item validations as in Order Entry, such as:

- Reserving the item (if using Immediate Reservation)
- Sending the order for credit card authorization, if applicable

- Performing credit checking to ensure the order has valid customer and payment information

If the credit card on the order has an elapsed expiration date, the system advances you to the [Confirm Invalid Expiration Date Screen](#) where you can change the expiration date or enter a different payment method.

If you use price table pricing, you can review any resulting repricing or new premium items on the order by selecting *Premium Items*.

See [Changing Item Detail Line Information in Order Maintenance](#), for field descriptions and more information on how price tables work in Order Maintenance.

Maximum line quantity/value: See [Confirm Quantity/Line Value Window](#) for more information on how the system validates these maximums.

Item/SKU comments window: The [Work with Item/SKU Comments Window](#) opens if there are comments associated with the item or SKU added to the order.

Cursor position: If the [Position Cursor on Offer Field in OE/OM \(F91\)](#) system control value is selected, the cursor will be positioned in the Offer field at the [Work with Order Lines Screen](#) or [Work with Order Line Screen](#); also, the Offer field will be blank.

Accompanying item: The system adds an accompanying item to the order if the selected item has been associated with one through the [Work with Accompanying Item Screen](#), and if the [Add Accompanying Items in Order Maintenance \(H28\)](#) system control value is selected.

**Note:**

If you update the originating item in order maintenance, the system does not update the accompanying item. For example, if you sell out the originating item in order maintenance, the system does not also sell out the accompanying item.

Increasing the Quantity Ordered in Order Maintenance

Purpose: You can use the [Work with Order Line Screen](#) to increase the quantity ordered of an item on an existing order.

Retail pickup or delivery orders: You cannot increase the quantity on a retail pickup or delivery order from Order Orchestration. See the [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for more information.

For more information:

- decreasing the quantity ordered of an item: [Canceling an Item in Order Maintenance](#)
- how price table repricing and premium items function in Order Maintenance: [Changing Item Detail Line Information in Order Maintenance](#)

Instructions:

1. At the [Work with Order Lines Screen](#), Select *Change* for an item. You advance to the [Work with Order Line Screen](#) with your cursor in the Qty field.
2. Enter the amount of the item that the customer wants to order.
3. Select OK to accept and validate the new quantity ordered and return to the [Work with Order Lines Screen](#).

4. The system updates the quantity ordered immediately. Notice the quantity in the Rsv (reserved) field if you are using Immediate Reservation.

Note:

- This option is available only for open or held order lines without a printed quantity.
- When you change the quantity ordered of a main set item, the change is also reflected in its component items.
- Selecting *Change* for a set component item is controlled by the [Set Component Maintenance \(J01\)](#) secured feature. If you do not have the required authority, the system displays an error message: Not authorized to change, delete, cancel, or sell out a set component.

Canceling an Item in Order Maintenance

Purpose: In order maintenance, select *Cancel* for an item at the [Work with Order Lines Screen](#) to cancel it from an order. You can cancel the entire open (unshipped) quantity of the item or lower the quantity (for example, to correct a keying error).

Restrictions:

- You cannot cancel an item if a pick slip has been printed for that item. Instead, you must first void the pick slip. See [Reprinting and Voiding Pick Slips \(WVRP or WSVP\)](#).
- Selecting *Cancel* for a set component item is controlled by the [Set Component Maintenance \(J01\)](#) secured feature. If you do not have the required authority, the system displays an error message: Not authorized to change, delete, cancel, or sell out a set component.

If the quantity you cancel is reserved, it will now be available for other orders.

To cancel an entire order: See [Canceling an Order through Order Maintenance](#).

Price tables: If you use price table pricing, canceling an item may affect pricing and premium items. See [Changing Item Detail Line Information in Order Maintenance](#).

Membership items: If you cancel a membership item, the system also cancels the customer membership if possible. See [Canceling a Membership Item](#) for a discussion.

Order status: See [Order Updates for Cancellation](#).

Order line status: See [Item Cancellation Results](#).

Brokered backorder: If the order line is currently assigned to Order Orchestration for fulfillment, you advance to the [Confirm Order Orchestration Cancel Window](#) when you select a line for cancellation. See [Canceling a Brokered Backorder Request](#) for more information.

Retail pickup and delivery orders: If you cancel an item on a retail pickup or delivery order, the system changes the Order Orchestration record's status to *Canceled* and sends a status inquiry request to Order Orchestration. If the order's status in Order Orchestration is:

- *Canceled*: the system does not send a status update to Order Orchestration; otherwise,
- If the order's status in Order Orchestration is anything but *Canceled*, the system sends a status update to Order Orchestration indicating the status is *Rejected*. In this situation, Order Orchestration then changes the order status to *New_order*.

! Important:

If Order Orchestration is configured to “reshop” (the Search retries setting at the Preferences screen is not set to 0), then in this situation Order Orchestration attempts to assign the order to another location for fulfillment.

See [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for an overview.

Cancellation email: The system generates an order or order line cancellation email or the *Outbound Email XML Message (CWEmailOut)* to the customer if:

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

- you have specified an:
- [Order Line Cancellation Email Program \(K79\)](#), if there is still at least one open line on the order or if there have been any shipments, or
- [Order Cancellation Email Program \(K78\)](#), if you are canceling the last open line on the order and there have not been any shipments, and
- the cancel reason code you use does not match the [Cancel Reason Code to Suppress Email \(L08\)](#), and
- the customer is eligible to receive email notifications; see [When Does the System Generate an Email Notification?](#)

If you cancel a full or partial order line using more than one cancel reason code, the order line cancellation email lists the entire quantity canceled during the current session. For example, the customer indicates that there was a keying error that resulted in reducing the order line quantity from 50 to 15; also, the customer wants to now reduce the order line quantity to 10. The email indicates a cancel quantity of 40, even though quantities of 35 and 5 were canceled using different cancel reason codes.

If you generate the *Outbound Email XML Message (CWEmailOut)*, the cancel reason code indicated is the last one used to cancel a quantity of the order line.

See the [Order Cancellation Confirmation Email Sample and Contents](#) and the [Order Line Cancellation Confirmation Email Sample and Contents](#) for more information.

In this topic:

- [Enter Cancel Reason Window](#)
- [Item Cancellation Results](#)
- [Canceling a Membership Item](#)
 - [Customer Membership Cancellation Window](#)
 - [Order Warning Message Window](#)
 - [Membership in Process Window](#)

For more information: See [Canceling an Order through Order Maintenance](#).

Enter Cancel Reason Window

To cancel: Select *Cancel* for an item at the [Work with Order Lines Screen](#) to cancel it. You advance to the Enter Cancel Reason pop-up window.

Field	Description
Order #	A unique number to identify an order. Numeric, 9 positions; display-only, assigned by the system.
Ship to number (unlabeled field to the right of the order number)	Indicates the number of shipping addresses on the order. Numeric, 3 positions; display-only, assigned by the system.
Item	A code for a unit of inventory. Item numbers are defined in and validated against the Item table. See Performing Initial Item Entry (MITM) . Alphanumeric, 12 positions; display-only.
SKU (Unlabeled fields to the right of the item number)	The unique characteristics of an item, such as its color and size. Alphanumeric, three 4-position fields; display-only.
Description (Unlabeled field below Item field)	The description associated with the item. Alphanumeric, 25 positions; display-only.
Current quantity ord (Quantity ordered)	The number of units of this item originally ordered.
 Note: If you have previously canceled units of this item with a cancel reason code set to reduce demand, the quantity in this field is reduced by the quantity canceled. See Item Cancellation Results.	
Current quantity can (Quantity canceled)	Numeric, 5 positions; display-only. The quantity of this item that has been canceled previously.
 Note: If you have previously canceled any units with a cancel reason code set to reduce demand, that quantity is not included in this field. See Item Cancellation Results.	
Current quantity S/O (Current quantity sold out)	Numeric, 5 positions; display-only, updated by the system. The quantity of this item that has been sold out. Numeric, 5 positions; display-only, updated by the system.
Current quantity shp (Current quantity shipped)	The quantity of the item that has shipped. Numeric, 5 positions; display-only, updated by the system.

Field	Description
Cancel qty (Quantity to cancel)	The quantity of the item to cancel. This field defaults to the quantity remaining on the line, calculated as: $\text{Quantity ordered} - (\text{quantity canceled} + \text{quantity sold out} + \text{quantity shipped}) = \text{Quantity to cancel}$ Select <i>Full/Line</i> to change this value, if necessary. A message appears if you try to cancel more units than are currently open (unshipped): Quantity to be canceled (xx) exceeds remaining open quantity (xx). Quantity for membership items: Ordinarily you would always enter membership items with a quantity of 1, since each membership item ordered creates a single customer membership, regardless of order quantity. The system does not let you cancel a partial quantity on an order line for a membership item. See Canceling a Membership Item for more information on canceling memberships. Numeric, 5 positions; display-only, updated by the system.
Cancel rsu (Cancel reason code)	The reason for canceling the line. Cancel reason codes are defined in and validated against the Cancel Reason table. See Establishing Cancel Reason Codes (WCNR). Select <i>Chg Cancel Qty</i> to change this value, if necessary. Numeric, 2 positions; required.
Recalculate freight	Determines whether the system refunds the freight charge to the customer for the canceled items. Valid values are: <i>Selected</i> = Recalculate and refund freight. If a Freight override amount is defined for the order and the Calculate freight field for the order ship to is selected, the system advances you to the Enter Freight Refund Window. <i>Unselected</i> (default) = Do not recalculate and refund freight. The Recalculate Freight Default (F62) system control value controls the default setting of this field, but you can override this default. Tax: The system recalculates tax regardless of the setting of this field.

1. Enter a valid cancel reason code in the Rsn field.
2. Optionally, select *Full/Line* to change the quantity of the item to cancel and enter the new quantity in the Qty field. (**Note:** This option is not available for a retail pickup or delivery order received from Order Orchestration; see [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for background.)
3. Optionally, select *Chg Cancel Qty* to change the cancel reason code and enter a new cancel reason code in the Cancel rsu field.
4. Optionally, change the value in the Recalculate freight field. If selected, and a [Freight override](#) amount is defined for the order, the system advances you to the [Enter Freight Refund Window](#).
5. Select OK.

Instructions:

Enter Freight Refund Window

Use this window to enter the freight amount to refund.

How to display this screen: This window displays if you select the Recalculate freight field on the [Enter Cancel Reason Window](#), a [Freight override](#) amount is defined for the order, and the Calculate freight field for the order ship to is selected.

Field	Description
Current freight amount	The current freight amount for the order, based on the Freight override amount on the Display Order Properties Screen . Numeric, 20 positions with a 2-place decimal; display-only.
Freight refund	The amount of freight to refund. Freight tax override: If a Freight tax override is defined for the order, the system uses the Freight tax rate to calculate the amount of tax on freight to refund. Numeric, 13 positions with a 2-place decimal; required.

Instructions:

1. Enter the amount of freight to refund in the Freight refund field.
2. Select OK. The system subtracts the freight refund amount from the current freight amount and updates the [Freight override](#) amount on the [Display Order Properties Screen](#) with the new [Freight override](#) amount. If a [Freight tax override](#) is defined for the order, the system uses the [Freight tax rate](#) to determine the new freight tax amount.

Example: You cancel a line on an order whose freight override amount is \$10.00 and freight tax override amount is \$2.50. The freight tax rate is 25%. At the Enter Freight Refund window, you enter \$4.00 as the freight refund amount. Based on the freight refund amount, the system:

- Refunds \$4.00 freight and \$1.00 freight on tax.
- Updates the freight override amount to \$6.00.
- Updates the freight tax override amount to \$1.50.

Item Cancellation Results

The effect of canceling an item depends on:

- whether you cancel the entire open quantity, and
- whether you reduce demand.

You reduce demand if you use a cancel reason code with the [Reduce demand](#) field selected. One reason to reduce demand is if the quantity ordered was keyed incorrectly (10 units instead of 1).

The results of the different types of item cancellations are described in the table:

Type of Cancellation	Line Status	Quantity Ordered	Canceled Quantity
Cancel entire quantity and reduce demand	<i>Closed</i>	reduced to zero	not affected
Cancel entire quantity and don't reduce demand	<i>Cancelled</i>	not affected	increased (by entire quantity ordered)
Cancel partial quantity and reduce demand	not affected	reduced (by quantity being canceled)	not affected
Cancel partial quantity and don't reduce demand	not affected	reduced (by quantity being canceled)	increased (by quantity being canceled)

Canceling a Membership Item

Overview: When you use order maintenance to cancel a membership item that created a customer membership, the system also cancels the customer membership if possible.

When is a customer membership eligible for cancellation? In order for the system to cancel the customer membership created by the membership item:

- the membership item must be eligible for cancellation; that is, it cannot yet be billed.
- the customer membership must be in *Active* or *Inactive* status.

Also, the customer membership must be a standard (non-loyalty) membership. You cannot cancel loyalty memberships through order maintenance, because you do not create these memberships by selling a membership item; instead, the system creates loyalty memberships based on the customer's order or sales activity. Only customer memberships you sell in order to generate orders or provide a discount are eligible for cancellation through cancellation of the related membership item.

What if the customer membership has already been canceled? If you have already canceled the customer membership through [Working with Customer Memberships \(WWCM\)](#) and you then cancel the membership item, the system simply cancels the membership item on the order like any other item.

Canceling a single membership on an order that created multiple customer memberships: It is possible to create more than one customer membership on an order by adding multiple membership items. If the system cannot determine which customer membership was created as the result of the membership item being cancelled, the [Customer Membership Cancellation Window](#) opens so you can select the correct membership to cancel. This situation can occur if you use a generic membership item to create different types of customer memberships, or if the customer has ordered two of the same membership item (for example, one for himself and one for a friend). You can use the Customer Membership Cancellation window to select the correct customer membership to cancel.

Canceling multiple memberships or the entire order: If you cancel multiple membership items or an entire order and the system cannot determine which customer membership was created for each membership item, the [Customer Membership Cancellation Window](#) opens so you can select a membership to cancel until each customer membership is accounted for. For example, you enter an order that creates a COFFEECLUB membership and a DISCOUNT membership, both created with the generic MEMBPGM item. If you cancel the entire order, the Customer Membership Cancellation window opens, displaying the COFFEECLUB and DISCOUNT memberships. Select either membership at this window. Once there is only one remaining customer membership left to cancel (for example, you cancel the COFFEECLUB membership, so only the DISCOUNT membership remains), the system does not need to display the window and can cancel the remaining membership automatically.

Situations in which you cannot identify the correct membership to cancel: There might be situations in which you cannot determine the differences between the customer memberships created through an order and displayed at the [Customer Membership Cancellation Window](#), described below. For example, you have created two customer memberships on the same order: one to ship to the sold-to customer, and one where you specify an alternate shipping address for the customer membership. In this situation, both the membership item and the membership program name are the same, so you cannot distinguish them at the Work with Order Lines screen or the Customer Membership Cancellation window.

In any situation where you might not be able to determine the correct order line or customer membership to cancel based on the information displayed in order maintenance, you should first cancel the correct customer membership through [Working with Customer Memberships \(WWCM\)](#) and then cancel the related membership item in order maintenance.

What if you have already generated orders for the customer membership? You can still cancel the membership item and prevent the customer membership from generating any subsequent orders, even if you have already used the [Generating Membership Orders \(EGMO\)](#) option to generate an order for the membership. In this situation, the [Order Warning Message Window](#), described below, indicates that you need to cancel the generated order(s) if the customer does not want to receive shipments.

If the membership generation is currently in process, or if the customer membership is in *In process* status because the generated order is suspended in batch, the [Membership in Process Window](#), described below, indicates that you need to cancel the customer membership through the [Working with Customer Memberships \(WWCM\)](#) option.

When do these windows open? If the system determines that it needs to display any of the windows described below, it does so at the end of your order maintenance session, after you have entered a cancel reason and clicked *Accept* to accept your changes. At this point, the maintenance accept process is already underway, and you can no longer reject your maintenance changes in order to prevent the customer membership(s) from being canceled.

Does the system cancel customer memberships automatically in any other situations? When you use the *Void/Cancel* option in [Reprinting and Voiding Pick Slips \(WVRP or WSVP\)](#), the system also cancels the related customer membership if the order includes a membership item. In this situation, the system uses the same logic as in order maintenance to determine whether to display the windows described below.

The system does not automatically cancel customer memberships through any other screen or process. For example, if you cancel an order or membership item through the e-commerce interface, you need to use [Working with Customer Memberships \(WWCM\)](#) to cancel the related customer membership.

No membership cancellation email generated: When you cancel the membership item in order maintenance, the system does not generate the membership cancellation confirmation email regardless of the setting of the [Membership Cancellation Email Program \(K77\)](#). See [Membership Cancellations](#) for a discussion.

For more information: See [Membership Overview](#) for background, and see [Working with Customer Memberships \(WWCM\)](#) for details on customer memberships.

Customer Membership Cancellation Window

This window opens when you cancel one or more order lines for membership items, and the system cannot determine which customer membership(s) should be canceled as a result.

For example, you use a generic item called MEMBPGM to create customer memberships in order entry, and then select the correct membership program at the [Enter Membership ID Window \(Selecting a Membership Program\)](#). You have recently entered an order for a customer to create two customer memberships:

- COFFEECLUB, to generate a shipment of coffee every month for 12 months; and
- DISCOUNT10, to provide the customer with a 10% discount on all orders for the next 12 months.

The customer decides to cancel the COFFEECLUB membership. In this situation, when you cancel the MEMBPGM item in order maintenance, you need to select the COFFEECLUB membership at the Customer Membership Cancellation window in order to cancel the correct customer membership.

For more information: See the discussion above under [Canceling a Membership Item](#).

Field	Description
Item	The membership item selected for cancellation. If you are canceling multiple membership items or an entire order that includes multiple membership items, then this window opens for each membership item until the system has accounted for each customer membership it needs to cancel. If there is only one remaining membership created by the order that is eligible for cancellation, then the system does not need to display the window for you to select the membership. The description of the membership item is to the right. Item: alphanumeric, 12 positions; display-only. Description: alphanumeric, 120 positions; display-only.
Membership ID	The code that identifies the membership program that serves as the template for the customer membership. The customer memberships displayed at this window can serve to generate membership orders, provide a discount percentage, or both. <i>Selecting a membership to cancel:</i> Click the membership ID in order to cancel this customer membership. Alphanumeric, 12 positions; optional.
Description	The description of the membership program. Alphanumeric, 30 positions; display-only.

Completing this window: Click the membership ID of the customer membership you want to cancel. See the discussion above for more information.

Cautions:

- If you are canceling multiple membership items, or an entire order that includes multiple membership items, the Customer Membership Cancellation window opens repeatedly until each customer membership that needs to be canceled is accounted for. If there is only one remaining membership created by the order that is eligible for cancellation, then the system does not need to display the window for you to select the membership.
- Once you select a customer membership at this window by clicking the Membership ID, the system continues to cancel the customer membership and closes your maintenance session. You do not have an opportunity to reject your selection.

Order Warning Message Window

This window opens if a customer membership selected for cancellation has already generated one or more membership orders. The window lists the membership item and item description related to the customer membership selected for cancellation. The system will complete the cancellation of the order line and the customer membership, so that it does not generate any additional orders; however, it cannot automatically cancel orders that you have already generated.

In order to identify and cancel the generated order(s), you can use the *Orders for Customer* option at the [Work with Customer Memberships Screen](#) in *Working with Customer Memberships (WWCM)*.

For more information: See the discussion above under [Canceling a Membership Item](#).

Membership in Process Window

This window opens if a customer membership selected for cancellation is in *In Process* status. This status indicates the membership generation is currently running, or that the membership generation has completed but the generated order is still suspended in batch. The generated

order might be suspended if there is an error requiring resolution, such as a ship via that is not valid for the shipping address. The window indicates the membership item and item description related to the customer membership selected for cancellation.

In this situation, the system still completes the cancellation of the order line for the membership item, but you need to use the [Working with Customer Memberships \(WWCM\)](#) option to cancel the customer membership, and use batch order entry to reject the suspended order.

For more information: See the discussion above under [Canceling a Membership Item](#).

Canceling an Order through Order Maintenance

Purpose: You can cancel an entire order by selecting *Cancel Order* on the [Work with Order Screen in Order Maintenance](#) or the [Work with Order Lines Screen](#) in order maintenance. The system frees up any reserved inventory on the canceled order and makes it available to other orders.

To cancel an order line: See [Canceling an Item in Order Maintenance](#).

What if the order includes a membership item? See [Canceling a Membership Item](#) for information.

Canceling brokered orders: You need authority under the [Cancel Order Broker Lines \(B19\)](#) secured feature to cancel a retail pickup, delivery, or store pickup order, or an order that includes a brokered backorder line. For an overview, see [Order Orchestration Integration](#), including:

- [Canceling a Brokered Backorder Request](#)
- [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#)
- [Canceling a Store Pickup Order](#)

Canceling a retail pickup or delivery order: If you cancel a retail pickup or delivery order, the system changes the Order Orchestration record's status to *Canceled* and sends a status inquiry request to Order Orchestration. If the order's status in Order Orchestration is:

- *Canceled*: the system does not send a status update to Order Orchestration; otherwise,
- If the order's status in Order Orchestration is anything but *Canceled*, the system sends a status update to Order Orchestration indicating the status is *Rejected*. In this situation, Order Orchestration then changes the order status to *New_order*.

Important:

If Order Orchestration is configured to “reshop” (the Search retries setting at the Preferences screen is not set to 0), then in this situation Order Orchestration attempts to assign the order to another location for fulfillment.

Canceling a quote through order maintenance: See [Canceling a Quote through Order Maintenance](#) for information.

Cancellation email: The system generates an order cancellation email or *Outbound Email XML Message (CWEmailOut)* to the customer if:

- you have specified an [Order Cancellation Email Program \(K78\)](#), and
- there have not been any shipments on the order, and

- the cancel reason code you use does not match the [Cancel Reason Code to Suppress Email \(L08\)](#), and
- the customer is eligible to receive email notifications; see [When Does the System Generate an Email Notification?](#)

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

If there have been any shipments on the order, the system generates the order line cancellation email even if all the remaining order lines are now canceled.

See the [Order Cancellation Confirmation Email Sample and Contents](#) and the [Order Line Cancellation Confirmation Email Sample and Contents](#) for more information.

In this topic:

- [Enter Cancel Reason Window](#)
- [Order Updates for Cancellation](#)
- [Picks Pending Window](#)

Enter Cancel Reason Window

To cancel: Select *Cancel Order* at the [Work with Order Screen in Order Maintenance](#) or [Work with Order Lines Screen](#) to display the Confirm Cancel window. If you select OK at this pop-up window, you advance to the Enter Cancel Reason window.

Field	Description
Order #	The number of the order you wish to cancel. Numeric, 9 positions; display-only, assigned by the system.
Ship to number (Unlabeled field to the right of the order number)	The number of shipping addresses for the order you wish to cancel. Numeric, 3 positions; display-only, assigned by the system.
Cancel reason	The reason for canceling the entire order. Cancel reason codes are defined in and validated against the Cancel Reason table; see Establishing Cancel Reason Codes (WCNR) . Numeric, 2 positions; required.
Cancel all ship to's	Controls whether the system cancels each recipient order or only the current order. A recipient order is an order that is shipping to a different address. Valid values are: • <i>Selected</i> = Cancel all recipient orders. • <i>Unselected</i> = (default) Cancel only the current order.

Note:

If the [Submit O/M Cancel Asynchronously \(M36\)](#) system control value is selected, the Cancel all ship-tos field does not display on the Enter Cancel Reason window and the setting defaults to selected.

Field	Description
Recalculate freight	Determines whether the system refunds the freight charge to the customer for the canceled items. Valid values are: <i>Selected</i> = Recalculate and refund freight. The system will recalculate freight down to zero. <i>Unselected</i> (default) = Do not recalculate and refund freight. The Submit O/M Cancel Asynchronously (M36) system control value controls the default setting of this field, but you can override this default. Tax: The system recalculates tax regardless of the setting of this field.

 Note:

If the [Submit O/M Cancel Asynchronously \(M36\)](#) system control value is selected, the Recalculate freight field does not display on the Enter Cancel Reason window and the setting defaults from the [Recalculate Freight Default \(F62\)](#) system control value.

When you select *OK* at the Enter Cancel Reason window to submit the order cancel, the system looks at the setting of the [Submit O/M Cancel Asynchronously \(M36\)](#) system control value.

- If the [Submit O/M Cancel Asynchronously \(M36\)](#) system control value is selected, the system submits the order cancel asynchronously. The system locks the order until the cancel is complete. In addition, the system writes a message to the TRACE log when an asynchronous order cancel starts and when it ends.
- If the [Submit O/M Cancel Asynchronously \(M36\)](#) system control value is unselected, the system submits the order cancel synchronously.

Order Updates for Cancellation

The system performs these updates when you select *Cancel Order* on the [Work with Order Screen in Order Maintenance](#) or the [Work with Order Lines Screen](#) in order maintenance, based on whether the cancel reason code you use reduces demand:

Reduce Demand?	Order Status	Line Status	Quantity Ordered	Quantity Canceled
no	<i>Cancelled</i> if you cancel the entire order. <i>Closed</i> if part of the order has already shipped or was soldout.	<i>Cancelled</i> if you cancel the entire order line. <i>Closed</i> if all or part of the order line has already shipped. Note: Any lines that were previously soldout remain in a <i>Soldout</i> status.	not affected	updated with quantity cancelled

Reduce Demand?	Order Status	Line Status	Quantity Ordered	Quantity Canceled
yes	<i>Closed</i>	<i>Closed</i> Note: Any lines that were previously soldout remain in a <i>Soldout</i> status.	decreased by quantity cancelled; 0 displays if the entire line was cancelled	not affected

See [Establishing Cancel Reason Codes \(WCNR\)](#) for more information about reducing demand.

The order remains on the system for inquiry purposes; you can reopen a canceled order through Order Maintenance by adding a new item to the order.

You cannot update any canceled lines through Order Maintenance.

Picks Pending Window

Purpose: This window opens when you select *Cancel Order* to cancel an order that has printed pick slips.

To complete this window: Select *Void/Reprint* to void the pick slips, or select *OK* or *Exit* to cancel. You cannot cancel the order until pick slips are voided.

If you select *Void/Reprint*, you advance to the [Reprint/Void Pick Slips by Order Screen](#). An error message indicates if you are not authorized to void pick slips:

User (SBROWN) is not authorized to void pick slips.

Returning and Exchanging Items in Order Maintenance

Purpose: Select the return and exchange option in order maintenance to handle customer merchandise returns, by automatically:

- authorizing the return
- processing the return
- returning the item to active or inactive inventory
- crediting the customer for the returned item (the refund is created and ready for processing)
- optionally, adding an exchange item to the order

These processes all take place “behind the scenes” when you process a return or exchange in order maintenance. You can, however, perform the creation, receipt, and credit of the return in separate stages through the following options:

- Work with Return Authorizations; see [Working with Return Authorizations: Standard Process](#) or [Working with Return Authorizations: Streamlined Process](#).
- Work with Return Authorization Receiving; see [Receiving Returns \(WRAR\)](#).
- Work with Return Authorization Credits; see [Crediting Returns \(WRAC\)](#).

Other return options:

- You can also enable customers to create return authorizations at the web storefront. See [Introducing Return Authorizations \(WRTA\)](#) for an overview.

- You can use the *Inbound Return API* to receive a *Return Request Message (CWReturnIn)* from an external system. See *Inbound Return API* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).for an overview.
- Returns can also be performed by entering a negative quantity on an order in Order Entry. See [Posting a Return or Exchange Through Order Entry](#).

Retail pickup or delivery orders: If the [Suppress Returns for Retail Pickup/Delivery \(L88\)](#) system control value is:

- selected, you cannot process a return against a retail pickup or delivery order or add a negative additional charge
- unselected, you can process a return against a retail pickup or delivery order; however, the [Order Broker Payment Type \(K98\)](#) is deactivated after shipment, so you would then need to enter a new payment method in order to process the related refund.



Note:

Regardless of the setting of the [Suppress Returns for Retail Pickup/Delivery \(L88\)](#) system control value, you cannot enter a line with a negative quantity or apply a discount against a shipped order line on a retail pickup or delivery order.

The system does not send a status update to Order Orchestration when you process a return against a retail pickup or delivery order.

See [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for an overview.

Ship-for-pickup orders: You can process a return for a ship-for-pickup order as long as the [Payment at POS for Ship for Pickup Orders \(L60\)](#) system control value is not selected. This system control value also controls the ability to enter a return through a negative quantity, apply a discount to a closed order line, and apply a negative additional charge in order maintenance. See [Ship-for-Pickup Orders](#) for background.

Store pickup orders: You cannot process a return against a store pickup order. See [Store Pickup Orders](#) for an overview.

In this topic:

- [Starting the Return Process](#)
 - [Types of Returns](#)
 - [No Primary Location Window](#)
 - [Tax Override](#)
- [Return/Exchange Item Screen \(Single Item\)](#)
- [Return/Exchange Item Screen \(Entire Order\)](#)
- [Create RA Detail Screen \(Entering a Misship Return\)](#)
- [Enter Exchange Item Screen](#)
 - [Add Reason Code Window](#)
- [Receiving the Return](#)
 - [Type of Return Updates](#)
- [Completing the Return Process](#)

Starting the Return Process

Purpose: You can process a return against an item or an entire order in order maintenance. The system creates and processes a return authorization automatically, because entering a return through order maintenance indicates that you have physically received the item being returned (or your drop ship vendor has received the item) and you are updating the order to reflect this change in the order status.

Authority: You must have complete authority to create, receive, and credit a return in order to use order maintenance for returns processing. Returns authority is controlled by three secured features:

- [Enter Return Authorization \(A28\)](#)
- [Receive Return Authorization \(A29\)](#)
- [Credit Return Authorization \(A34\)](#)

Overview of the returns process: See [Introducing Return Authorizations \(WRTA\)](#) for an overview of the steps in the return authorization process and the table updates that take place at each step. These steps and updates take place “behind the scenes” when you process a return in order maintenance.

Return authorization download triggers: If the [Create Return Download Triggers \(K28\)](#) system control value is *selected*, the system creates a return authorization download (RAD) trigger when you post a return in order maintenance, based on the trigger rules defined for the Return Authorization Download (RETURN_OUT) integration layer job. The RETURN_OUT integration layer job monitors for return authorization download triggers and generates a Return Authorization Outbound XML Message (CWReturnRAOut) to send the return authorization information to a remote system.

Types of Returns

The Return/Exchange Item screen in order maintenance is your point of access for entering returns, exchanges, and misshipments. Your entries to this screen not only define how the refund will be calculated, but determine which screens you use to process the return:

Type of Return	Comments
Returning a single item	Select <i>Return</i> for an item to specify the quantity to return (which must be equal to or less than the quantity shipped) and indicate whether the item is being exchanged for a new item at the Return/Exchange Item Screen (Single Item) .
Returning the entire order	Select <i>Return</i> to return the entire order using the Return/Exchange Item Screen (Entire Order) . The system assumes that you want to process the return of all shipped quantities on the order. The system also assumes that the customer is not requesting an exchange because you need to identify which returned item is being exchanged for a new item.

Type of Return	Comments
Performing a straight return	You can perform a straight return of an item or an order by entering a valid return reason code, return disposition code, and (optionally), the warehouse and location into which you will receive the return. The system will issue the appropriate refund to the customer for the return. The system will perform a return type of inventory transaction for the returned item. Additionally, the system will add a record to the Display Order Line History Screen for the order detail line or the Display Order History Screen (if returning the entire order) to keep an audit trail of activity on the order; see Type of Return Updates and Completing the Return Process.
Performing a return/exchange	You can return an item and send the customer an exchange item by entering a valid exchange reason code, a valid return disposition code, and (optionally), the warehouse and location into which you will receive the return. You advance to the Enter Exchange Item Screen, where you can identify the item that will be sent to the customer in exchange for the returned item. The system will process a return and add a line to the order for the addition of the exchange item. Additionally, a record will be added to the Display Order Line History Screen for the order detail lines being returned and added. In order to perform more than one return and/or exchange against the same order line for the same warehouse and location, you must select <i>Accept</i> for the entered return or exchange before performing a subsequent return or exchange. If not, the system displays the following error message: Multiple returns not allowed for same Item/Whse/Loc. However, you can still perform a return for the same line but to a different warehouse and location, or a return for a different order detail line, before selecting <i>Accept</i>. Credit card net exchange billing: If the Use CC Net Exchange Billing (M23) system control value is selected and the order contains a credit card pay type, the system may hold the credit invoice for the return to net it against the debit invoice for the associated exchange in order to reduce the number of transactions that occur for an exchange; see Credit Card Net Exchange Billing.
Multiple vendors for drop ship items	Managing returns on drop ship items through integration with Order Orchestration is not currently supported.
Entering a misship return	Optionally, you can select <i>Create Misship Return</i> at the Return/Exchange Item Screen (Single Item) to create a misship return for an item that was mistakenly picked in the warehouse or an item that was shipped along with the requested item. You advance automatically to the Create RA Detail Screen (Entering a Misship Return), where you can enter and return the mis-shipped item in one step.

No Primary Location Window

You might receive returns for items which have no primary location, such as items that you have previously liquidated and sold through an outlet store, or the items are drop ship items shipped directly from the vendor. For these items, if you have selected the [Display "No Primary Location" Message in Returns \(G46\)](#) system control value, the system displays a pop-up window indicating that a primary location for the item when you enter and validate the item as a return or a mis-ship.

This window is informational only. You can select *Cancel* to cancel the window, and then, if you wish, change the return disposition code before updating your entries and accepting/processing the return.

This window does not appear when you use the option of returning the entire order by selecting *Return* at the [Work with Order Lines Screen](#).

Tax Override

Order Administration updates the Tax override field for an order line to *Selected* if the order was received from an external system and a tax, GST, or PST amount was defined, indicating the tax amount from the external system should be retained on the order line.

If the Tax override field for the order line you are returning is *selected*, the system does not call the regular tax routine to recalculate the amount of tax remaining on the order line and how much tax to include on the credit invoice. Likewise, if you use an external tax system to calculate tax, the system does not call the tax system to recalculate the tax amount.

Instead, the system prorates the tax override amount across the units ordered on the order line to determine the new tax override amount and the tax amount to return.

Determining the new tax override amount: The system uses the following calculations to determine the new tax override amount assigned to the order line:

Original order quantity - Cumulative return quantity = Net order quantity

Net order quantity / Original order quantity = Return ratio

Return ratio x Original tax override amount = New tax override amount

Example:

Order Line (tax override = Y)		Results
quantity ordered:	3	Net order quantity: $3 - 1 = 2$
tax override amount:	3.00	Return ratio: $2 / 3 = .66666$
return quantity:	1	New tax override amount: $.67 \times 3.00 = 1.99998$
		The new tax override amount (2.00) displays in the Tax field for the order line on the Display Order Detail screen.

Determining the tax amount to return: The system uses the following calculations to determine the tax amount to include on the credit invoice created for the return:

Current return quantity / Original order quantity = Return ratio

Return ratio x Original tax override amount = Returned tax amount

Example:

Order Line (tax override = Y)		Results
quantity ordered:	3	Return ratio: $1 / 3 = .33333$
tax override amount:	3.00	Returned tax amount: $.33333 \times 3.00 = .99999$
return quantity:	1	The returned tax amount (1.00) displays in the Tax field for the credit invoice on the Display Invoice Detail screen.

Return/Exchange Item Screen (Single Item)

Purpose: Use this screen to return an individual item on an order. See [Starting the Return Process](#).

How to display this screen: Select *Return* for a shipped item at the [Work with Order Lines Screen](#). See *Returning and Exchanging Items in Order Maintenance* for information on whether retail pickup, delivery, store pickup, or ship-for-pickup orders are eligible for returns.

Field	Description
Item/SKU	The code for the item and SKU that is being returned. Items are defined in and validated against the Item table. Alphanumeric, 12 positions; display-only. SKUs are defined in and validated against the SKU table. Alphanumeric, three 4-position fields; display-only.



Note:

These fields display only if you are returning a single item; they do not display if you Selected *Return* to return the entire order.

RA # (Return authorization number)

A code that identifies the return. The return authorization number is comprised of the order number, ship-to number, and return authorization number.

Order number

A unique number to identify an order.

The starting order number and last order number assigned are defined in the Number Assignment table.

Numeric, 8 positions; display-only, assigned by the system.

Ship-to number

(unlabeled field to the right of the Order # field): The number of shipping addresses for the order. The system assigns a ship-to suffix of 1 to a single recipient order.

Numeric, 3 positions; display-only, assigned by the system.

Return authorization number

The number assigned to this return authorization.

Numeric, 3 positions; display-only, assigned by the system.

Qty to return (Quantity to return)

The number of units of the item that are being returned. Must be less than or equal to the value in the Unreturned qty field.



Note:

This field displays only if you are returning a single item by selecting *Return* for the item line; it does not display if you selected *Return* to return the entire order.

Numeric, 5 positions; required if returning a single item.

Field	Description
Unreturned quantity	The quantity on the order or the order detail line that has been shipped and is eligible to be returned. The system updates this field when shipments and returns occur.

**Note:**

This field displays only if you are returning a single item by selecting *Return* for the item line; it does not display if you selected *Return* to return the entire order.

Return reason	Numeric, 5 positions; display-only, updated by the system. Indicates the reason that the customer is returning an item. Return reason codes are defined in and validated against the Return Reason table. See Establishing Return Reason Codes (WRTR). Numeric, 3 positions; optional.
Exchange reason code	Indicates the reason that the customer is returning one item and ordering a replacement item. Exchange reason codes are defined in and validated against the Exchange Reasons table; see Establishing Exchange Reason Codes (WEXR).

**Note:**

This field is available only if you are returning a single item; it is not available if you selected *Return* to return the entire order. Also, it is not available when you are working with a retail pickup or delivery order. See [Maintaining Retail Pickup or Delivery Orders from Order Orchestration](#) for a discussion.

You advance automatically to the [Enter Exchange Item Screen](#) when you enter a valid exchange reason code after completing this screen.

Numeric, 3 positions; optional.

Field	Description
Return disposition	A code that identifies how a returned item will be handled by the system, in terms of whether the return updates inventory and the warehouse and location to which the item will be returned. You must enter a valid return disposition code when performing any type of return, such as a straight return, entering an exchange item, etc. <i>Affect inventory?</i> If the return disposition code affects inventory (meaning that the item will be returned into active inventory and update the on-hand quantity in the specified location), you must specify the warehouse and location where the item will be returned. If the disposition code is set up to affect inventory and return to the primary location, the system will check for the primary location for the item. If one is available, the system will return the item automatically to this warehouse location. If one is not available or if the disposition code is not set up to receive returns in the primary location, the system will receive the return in the warehouse and location defined for the return disposition; however, you can override these values to return the item to an alternate location. If the item/location does not exist, the system will create a record in the Item/Location table automatically.

**Note:**

See [No Primary Location Window](#).

	<i>Authority:</i> You can set authority to process a return for a specific return disposition value at the user or user class level. This can be a blanket authority for all disposition values, or can be specific to individual codes. An error message indicates if you do not have authority to the return disposition code specified: User Does not have authority to return disposition code 4A. Return disposition codes are defined in and validated against the Return Disposition Values table; see Establishing Return Disposition Values (WRDV). Alphanumeric, 2 positions; required.
Warehouse	A code for the warehouse where this item is being returned. Warehouse codes are defined in and validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions; required if the return disposition code affects inventory.
Location	The location in the designated warehouse where the item will be returned. The location code typically consists of 4 different elements: zone, aisle, shelf, and bin. See Creating and Maintaining Locations (WLOC). Alphanumeric, 7 positions; required if the return disposition code affects inventory.

Field	Description
Refund freight	Indicates whether to refund the freight charge for the returned item or returned order for the return. Valid values are: • <i>Selected</i> = Refund freight. If a Freight override amount is defined for the order and the Calculate freight field for the order ship to is selected, the system advances you to the Enter Freight Refund Window. • <i>Unselected</i> (default) = Do not refund the shipping charges. If you <i>select</i> this field and the source code uses a header level freight method, the system refunds a proportionate amount of freight for the items being returned. If you <i>select</i> this field and the source code uses a line level or flat freight method, the system refunds the freight charge for the returned items on the order.
	 Note: Your entry in this field also controls whether the system refunds any service charges by ship via on the order. See Working with Ship Via Codes (WVIA).
Refund add'l chgs (Refund additional charges)	Indicates whether the system should refund the additional charges on the order. Valid values are: • <i>Selected</i> = Refund the additional charges • <i>Unselected</i> (default) = Do not refund the additional charges Because an order's additional charges are billed out with the first shipment on the order and a return is always performed against an invoice, when you specify to refund additional charges, the customer may not receive the intended refund if you are performing the refund against a subsequent invoice.
Refund handling	Controls whether the system will credit the customer for handling charges assessed on the item being returned. Valid values are: • <i>Selected</i> = the system will include the charge for special handling in the customer's refund. • <i>Unselected</i> = any charges for special handling (item personalization, such as monogramming, etc.), will not be refunded to the customer.

Field	Description
Refund duty charges	Controls whether to refund duty charges assessed on international shipments. The duty charges for an order are generally included in the Handling field, but you can review the duty charge for an individual item by selecting <i>Change</i> for the item in order entry or Maintenance, or <i>Display</i> for an item in standard Order Inquiry. Valid values are: <i>Selected</i> (default) = Refund duty charges for the item or order <i>Unselected</i> = Do not refund duty. You can review the actual amount of duty that has been billed or refunded for an item on a particular invoice in standard Order Inquiry on the Invoice Detail Charges Screen. To display this screen, select <i>Invoices</i> to review invoices, select <i>Display Details</i> for an invoice to display details, then select <i>Detail Charges</i> for the invoice detail.

Screen Option	Procedure
Enter and return an order detail line for an item that was mistakenly shipped to the customer	Select <i>Crt Misship Rtrn</i> to advance to the Create RA Detail Screen (Entering a Misship Return) .

Enter Freight Refund Window

Use this window to enter the freight amount to refund.

How to display this screen: This window displays if you select the Refund freight field on the [Return/Exchange Item Screen \(Single Item\)](#), a [Freight override](#) amount is defined for the order, and the Calculate freight field for the order ship to is selected.

Field	Description
Current freight amount	The current freight amount for the order, based on the Freight override amount on the Display Order Properties Screen. Numeric, 20 positions with a 2-place decimal; display-only.
Freight refund	The amount of freight to refund. Freight tax override: If a Freight tax override is defined for the order, the system uses the Freight tax rate to calculate the amount of tax on freight to refund. Numeric, 13 positions with a 2-place decimal; required.

Instructions:

1. Enter the amount of freight to refund in the Freight refund field.
2. Select *OK*. The system subtracts the freight refund amount from the current freight amount and updates the [Freight override](#) amount on the [Display Order Properties Screen](#) with the new [Freight override](#) amount. If a [Freight tax override](#) is defined for the order, the system uses the [Freight tax rate](#) to determine the new freight tax amount.

Example: You return a line on an order whose freight override amount is \$10.00 and freight tax override amount is \$2.50. The freight tax rate is 25%. At the Enter Freight Refund window, you enter \$4.00 as the freight refund amount. Based on the freight refund amount, the system:

- Refunds \$4.00 freight and \$1.00 freight on tax.

- Updates the freight override amount to \$6.00.
- Updates the freight tax override amount to \$1.50.

Return/Exchange Item Screen (Entire Order)

Purpose: Use this screen to return all shipped items on an order. This screen is similar to the [Return/Exchange Item Screen \(Single Item\)](#); however, it does not display item information, the Qty to return or Exchange reason code fields because you are returning all shipped items on the order.

How to display this screen: Select *Return* at the [Work with Order Screen](#) or [Work with Order Lines Screen](#) to return the entire order. See [Return/Exchange Item Screen \(Single Item\)](#) for an explanation of each field on this screen, and see [Returning and Exchanging Items in Order Maintenance](#) for information on whether retail pickup, delivery, store pickup, or ship-for-pickup orders are eligible for returns.

Create RA Detail Screen (Entering a Misship Return)

Purpose: Use this screen to create a misship return, in which you enter information for a returned item that was shipped to the customer by mistake.

When to use this screen: Typically, you create a misship return for an item that was mistakenly picked in the warehouse or an item that was shipped along with the requested item.

Processing the misship: When you complete this screen, the system will enter and return the misshipped item in a single process. The system will add a “no charge” order detail line to the order for the mis-shipped item. Additionally, the system will write a message on the [Display Order Line History Screen](#) for this transaction.

To enter an exchange item: Optionally, you can enter a valid exchange reason code in the Exchange reason field on this screen to advance to the [Enter Exchange Item Screen](#) so you can enter the item that the customer really wants. If you define an exchange item to replace the mis-shipped item, the system will add two lines to the order. The first line adds and returns the mis-shipped item and the second line adds the exchange item to the order. The system will process the exchange item as if it was added through order entry. The usual order processing will be performed, which includes running all credit check routines and reserving the item if using Immediate Reservation. The actual pick slip for the exchange item will be produced when you run the Pick Slip Generation program.

The system will write a message to the [Display Order Line History Screen](#) for this transaction.

How to display this screen: Select *Crt Misship Rtrn* at the [Return/Exchange Item Screen \(Single Item\)](#).

Field	Description
RA number (Return authorization number)	A code that identifies the return. The return authorization number includes the order number, ship-to number, and return authorization number. Order number A unique number assigned by the system to identify an order. Numeric, 8 positions; display-only, assigned by the system. Ship-to number (unlabeled field to the right of the Order # field): Indicates the number of shipping addresses for the order. The system assigns a ship-to suffix of 1 to a single recipient order. Numeric, 3 positions; display-only, assigned by the system. Return authorization number A system-assigned code for a return authorization. Numeric, 3 positions; display-only, assigned by the system.
Lne # (Return authorization line number)	The line number on the return authorization. Up to 999 items may be returned on a single return authorization. Numeric, 3 positions; display-only, assigned by the system.
Item	The code for the mis-shipped item that the customer is returning. Item codes are defined in and validated against the Item table. See Performing Initial Item Entry (MITM). You can enter a cross reference code that represents another system's item and SKU code in this field. If you enter a cross reference code, the system searches the SKU Cross Reference table alphanumerically for the first Order Administration item and SKU that is associated with this cross reference code. You can maintain cross reference codes in Maintaining SKU Cross Reference Codes (MSKR).
	 Note: You cannot enter a set item as a misship return or exchange if more than one of the set item components reside in the same item warehouse location. In this case the system will display the following message when you try to process the misship:
	Multiple returns not allowed for same item/warehouse/location. Alphanumeric, 12 positions; required.
SKU	The SKU code for the mis-shipped item (if any), that further defines an item's color, size, width, or any other type of user-defined attribute. SKUs are defined in and validated against the SKU table. Alphanumeric, three 4-position fields; required if the item has SKUs.
Order line#	The line number against which you are processing the return. In the case of a misshipped item, no line number is available because this item was never on the order. Numeric, 3 positions; display-only.

Field	Description
Invoice # (Invoice number)	A unique number to identify the invoice against which the item was shipped and billed. In the case of a mis-shipped item, no invoice number is available because this item was never on the order. Numeric, 7 positions; display-only, assigned by the system.
Invoice line number (Unlabeled field to the right of the Invoice# field)	The line number on the invoice on which the item was shipped and billed. In the case of a misshipped item, no invoice line number is available because this item was never on the order. Numeric, 3 positions; display-only, assigned by the system.
Refund freight	This setting does not affect mis-ship returns. Alphanumeric, 1 position; required.
Refund add'l chgs	This setting does not affect mis-ship returns. Alphanumeric, 1 position; required.
Refund handling	This setting does not affect mis-ship returns. Alphanumeric, 1 position; required.
Refund duty	This setting does not affect mis-ship returns. Alphanumeric, 1 position; required.
Qty to return (Quantity to return)	The quantity of the mis-shipped item that the customer is returning. Numeric, 5 positions; required.
Qty returned (Quantity returned)	The quantity of this item that has actually been returned through the returns function in order maintenance or through the return authorization program. In the case of a mis-shipped item, no quantity returned is available because this item was never on the order. Numeric, 5 positions; display-only; updated by the system.
Qty credited (Quantity credited)	The quantity of the returned item that has been credited (refunded) to the customer. In the case of a mis-shipped item, no quantity credited is available because this item was never on the order. However, the system updates the Date credited field in the RA Header table to indicate a pending credit does not exist. Numeric, 5 positions; display-only, updated by the system.
Return reason	Represents a reason that the customer is returning the mis-shipped item. Return reason codes are defined in and validated against the Return Reason table; see Establishing Return Reason Codes (WRTR) . Numeric, 3 positions; optional -- complete the Return reason or Exchange reason field.

Field	Description
Exchange reason	Represents a reason that the customer is returning one item and ordering a replacement item. In the case of a mis-shipped item, you can enter and return the mis-shipped item and add a new item to the order for the item originally requested by the customer. If you enter a valid exchange reason code, you advance automatically to the Enter Exchange Item Screen where you can define the replacement item.

**Note:**

This field is not available when you are working with a retail pickup or delivery order. See [Maintaining Retail Pickup or Delivery Orders from Order Orchestration](#) for a discussion.

	Exchange reason codes are defined in and validated against the Exchange Reason table; see Establishing Exchange Reason Codes (WEXR). Numeric, 3 positions; optional -- complete the Return reason or Exchange reason field.
Disposition code	A code that identifies how a returned item will be handled by the system, in terms of whether the return updates inventory and the warehouse and location to which the item will be returned. You must enter a valid return disposition code when performing any type of return, such as a straight return, entering an exchange item, etc. <i>Affect inventory?</i> If the return disposition code affects inventory (meaning that the item will be returned into active inventory and update the on-hand quantity in the specified location), the system requires the warehouse and location where the item will be returned. If the disposition code is set up to affect inventory and return to the primary location, the system will check for the primary location for the Item. If one is available, the system will return the item automatically to this warehouse location. If one is not available or if the disposition code is not set up to receive returns in the primary location, the system will receive the return in the warehouse and location defined for the Return Disposition; however, you can override these values to return the item to an alternate location. If the item/location does not exist, the system will create a record in the Item/Location table automatically.

Field	Description				
	 Note: See No Primary Location Window. <i>Authority:</i> You can set authority to process a return for a specific return disposition value at the user or user class level. This can be a blanket authority for all disposition values, or can be specific to individual codes. An error message indicates if you do not have Return Disposition Code Authority (A83) to the return disposition code specified: User Does not have authority to return disposition code 4A. Return disposition codes are defined in and validated against the Return Disposition Values table; see Establishing Return Disposition Values (WRDV). Alphanumeric, 2 positions; required. <tr> <td>Warehouse</td><td> The warehouse where the returned item will be received; this value is used only if the disposition code affects inventory. Warehouse codes are defined in and validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions; display-only. </td></tr> <tr> <td>Location</td><td> The physical location within the warehouse where the returned item will be received, this value is used only if the disposition code affects inventory. Locations are defined in and validated against the Warehouse/Location table. See Creating and Maintaining Locations (WLOC). Alphanumeric, 7 positions; display-only. </td></tr>	Warehouse	The warehouse where the returned item will be received; this value is used only if the disposition code affects inventory. Warehouse codes are defined in and validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions; display-only.	Location	The physical location within the warehouse where the returned item will be received, this value is used only if the disposition code affects inventory. Locations are defined in and validated against the Warehouse/Location table. See Creating and Maintaining Locations (WLOC). Alphanumeric, 7 positions; display-only.
Warehouse	The warehouse where the returned item will be received; this value is used only if the disposition code affects inventory. Warehouse codes are defined in and validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions; display-only.				
Location	The physical location within the warehouse where the returned item will be received, this value is used only if the disposition code affects inventory. Locations are defined in and validated against the Warehouse/Location table. See Creating and Maintaining Locations (WLOC). Alphanumeric, 7 positions; display-only.				

Enter Exchange Item Screen

Purpose: Use this screen to identify the item to send to the customer to replace the returned or mis-shipped item.

Pricing the exchange item: You can send the exchange item to the customer at no charge by selecting *No Charge* in the No charge field; if you select *Priced* for this field, the customer will be charged for the item. If you select the Use existing price field, the system will apply the price of the returned item to the replacement item, regardless of any discounts applied.

Specifying a warehouse or shipper: You can specify a particular warehouse in which the exchange item should be picked and/or a particular shipper to deliver the item. For example, you can specify an overnight shipper if the customer requests immediate delivery of the exchange item. If you leave the Ship via and Warehouse fields blank, the system uses the ship via and warehouse specified for the order on the Order Header screen.

Processing the exchange: When you complete this screen, the system processes the return receipt and adds a line to the order for the exchange item. The system also writes a message to the [Display Order Line History Screen](#) for the returned item and the exchange item to account for this activity.

When you complete the return/exchange and process the return by selecting *Accept*, the system reruns the credit check routines. If the extended price of the exchange item (units ordered * item price) is greater than the extended price of the returned item, the system may

place the order on hold for a balance due. In this case, you must contact the customer and adjust the order payment information through order maintenance to release the order.

Credit card net exchange billing: If the [Use CC Net Exchange Billing \(M23\)](#) system control value is selected and the order contains a credit card pay type, the system may hold the credit invoice for the return to net it against the debit invoice for the associated exchange in order to reduce the number of transactions that occur for an exchange; see [Credit Card Net Exchange Billing](#).

How to display this screen: Enter a valid exchange reason code at the [Return/Exchange Item Screen \(Single Item\)](#). This option is not available for a retail pickup or delivery order. See [Maintaining Retail Pickup or Delivery Orders from Order Orchestration](#) for a discussion.

Field	Description
RA number (Return authorization number)	A code that identifies the return. The return authorization number includes the order number, ship-to number, and return authorization number. Order number A unique number assigned by the system to identify an order. Numeric, 8 positions; display-only, assigned by the system. Ship-to number (unlabeled field to the right of the Order # field): Indicates the number of shipping addresses for the order. The system assigns a ship-to suffix of 1 to a single recipient order. Numeric, 3 positions; display-only, assigned by the system. Return authorization number A system-assigned code for a return authorization. Numeric, 3 positions; display-only, assigned by the system.
RA line # (Return authorization line number)	The line number on the return authorization. Up to 999 items may be returned on a single return authorization. Numeric, 3 positions; display-only, assigned by the system.
Offer	The offer from which you want to add the exchange item. The offer associated with the return order line defaults, but you can override it. Alphanumeric, 3 positions; required.
Item (Item number)	The code for the exchange item that replaces the returned item. You can enter a cross reference code that represents another system's item and SKU code in this field. If you enter a cross reference code, the system searches the SKU Cross Reference table alphabetically for the first Order Administration item and SKU that is associated with this cross reference code. You can maintain cross reference codes in Maintaining SKU Cross Reference Codes (MSKR). Alphanumeric, 12 positions; required.
SKU	The style of the exchange item, which may include its color, size, width, or any other type of user-defined attribute. Alphanumeric, three 4-position fields; required (depending on item entered).
Qty ordered (Quantity ordered)	The number of units of the exchange item being ordered. Numeric, 5 positions; required.

Field	Description
No charge	Determines whether the exchange item will be given to the customer at no charge. Valid values are: • <i>No Charge</i> = Customer is not charged for the item • <i>Priced</i> = The customer will be charged the regular item price for the exchange item
Use existing price	Controls whether the system will apply the unit price of the returned item for each unit you ship of the replacement item, resulting in no net increase or decrease in merchandise charge for the exchange. This might be useful if you sold the original item at a discount and want to replace the item without imposing the regular, non-discounted price. However, if you enter Y in this field, the system uses the original item price whether it was higher or lower than the returned item price. Valid values are: • <i>Selected</i> = Use the price of the original item for the replacement item. • <i>Unselected</i> (default) = Use the regular price of the replacement item.

**Note:**

The system requires that you have defined a default price override reason in the [Price Override Reason for Same Price Exchanges \(D92\)](#) system control value if you selected it. If no default has been defined, a message indicates:

Price Override Reason Code not found (SCV=D92).

Override price

The price at which the item will be added to the order.

You cannot enter an override price if the Use existing price field is set to *selected*.

**Note:**

To enter an override price, you must have authority to the secured feature [Price Overrides \(A23\)](#).

Even if you have authority to override prices, the percentage you can discount the existing price may be limited by system control value E55, Price Override Limit Percent, unless you have authority to secured feature [Override Price Override Limit \(A64\)](#), which allows you to override the limit percent from the system control table.

Alphanumeric, 13 positions with a 2-place decimal; optional.

Field	Description
Override reason	The reason you enter an override price. Price override reasons are defined in and validated against the Price Override Reason table. See Establishing Price Override Reason Codes (WPOR). Alphanumeric, 1 position; required if you enter a price in the Override price field.
Ship via	The shipper that will deliver the exchange item to the customer. Enter a ship via only if you want to use a shipper other than the one that delivered the order. Ship via codes are defined in and validated against the Ship Via table. See Working with Ship Via Codes (WVIA). Numeric, 2 positions; optional.
Warehouse	The warehouse from which the exchange item will be shipped. Enter a warehouse only if you want to ship from a warehouse other than the one used on the order. Warehouse codes are defined in and validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions; optional.

Completing this screen: Complete the required fields and select **OK**.

The table below indicates how the exchange item is priced, based on the setting of the No charge, Use existing price, Override price and Override reason fields.

No charge	Use existing price	Override price and reason	Results
Priced	blank	blank	Add the exchange item to the order using the regular price.
Priced	selected	blank	Add the exchanged item to the order using the existing price of the return item.
Priced	blank	10.00, P	Add the exchange item to the order using the override price of 10.00 and the price override reason P.
No Charge	blank	blank	Add the exchange item to the order for 0.00 using the Default Price Override Reason (B35) system control value.
No Charge	selected	blank	

Add Reason Code Window

The system displays this pop-up window when you add an item through an exchange or a mis-ship if:

- the [Require Reason for Lines Added in Order Maintenance \(D75\)](#) system control value is *selected*, or
- the Require reason code field for the item offer or SKU offer is *selected*.

**Note:**

If you are using add reason codes, you will need to enter both an exchange reason code and an add reason code when you process an exchange. You might want to use the add reason code differently for exchanges; for example, using the exchange reason code to track the practical reason for an exchange (too big, wrong color, etc.) and the add reason to track customer satisfaction or attitude.

The add reason code is a 5-position, alphanumeric field, defined in the Add Reason table, that defines the reason for adding an item to an order in order maintenance. See [Establishing Add Reason Codes \(WADR\)](#).

The [Work with Item/SKU Comments Window](#) opens if there are comments associated with the item or SKU added to the order.

Receiving the Return

Purpose: The system receives the return automatically when you select *Accept* during order maintenance to process the return authorization.

The system checks the disposition code in the return authorization to determine:

1. Whether to increase the on-hand quantity of the item when adding the item back into inventory.
2. The warehouse and location to which the item is being returned, if the item is returned to inventory.

If the item is being returned to inventory, the system performs the necessary inventory transaction automatically to “move” this item on the system to the warehouse and location specified in the return authorization record.

Processing returns through the integration with Order Orchestration’s Drop Ship Manager is not currently implemented.

Type of Return Updates

The [Display Order History Screen](#) is updated with a message when you select *Accept* to accept and process the return transaction in Order Maintenance.

Order History - Line Return

Selecting *Return* to return a single item in order maintenance adds one message line to this screen.

Order History - Order Return

Selecting *Return* to return the entire order adds one message line to this screen for each item being returned on the order.

Select Active Pay Method screen: The system displays the Select Active Pay Method screen when you select *Accept* during order maintenance to process the return authorization if a deactivated payment method exists on the order. Use this screen to select which active payment method will receive the credit.

Reviewing return activity through the Display Order History Screen: Select *Order History* from the [Work with Order Lines Screen](#) in order maintenance or the [Display Order Detail Screen \(Reviewing Order Line Detail\)](#) in standard Order Inquiry. You can also review this information in streamlined Order Inquiry by selecting the *Detail* option for the item.

The system adds an Rtn Auth (return authorization) type transaction message to the [Display Order History Screen](#) when you return a single line or entire order. This message also identifies the date when the credit was processed and the user who performed the return.

Select *History* for the item you want to review to advance to the [Display Order Line History Screen](#).

The system adds an R (Return) type activity message, displays the date when the return was performed, the user who performed the return, the quantity returned, and the exchange or return reason code used.

Completing the Return Process

Purpose: The final series of steps in the return process enables you to generate the refund, in which you are crediting the customer for the merchandise return.

Convert a return into a refund: The system automatically adds a refund record, if appropriate, to the Refund table when you accept a return transaction in order maintenance. This update occurs because the system credits the return automatically “behind the scenes” for returns you process in order maintenance, rather than as a separate step as in the return authorizations functions.

Steps: There are a series of steps you can follow to issue a refund to the customer for a return. Briefly listed, they include:

1. Printing the [Refund Due List](#) to determine which customers are eligible for refunds.
2. Selecting the [Working with Refunds, Writeoffs and Balances Due \(WREF\)](#) menu option to update information for a pending refund.
3. Selecting the [Processing Refunds \(MREF\)](#) menu option to issue the refund in the form of a refund check, etc.
4. Optionally, using the [Reprint Refunds Screen \(MREP\)](#) if you encountered a problem printing the refund checks.
5. Selecting the [Reconciling Checks \(MREC\)](#) menu option when you receive the canceled refund checks from the bank.

See [Issuing Refunds](#) for more information on refund processing.

Enter Payment Methods Screen in Order Maintenance

Purpose: Use this screen to apply a payment to the order or to change existing payment information.



Note:

The Enter Payment Methods screen is the only screen where you can enter payment information in Order Maintenance.

Why maintain payments? Some examples of when you would need to maintain payments on an order include:

- adding a payment to an order that is on hold for a balance due (this automatically releases the order from hold)
- manually authorizing a credit card order that you cannot authorize through your regular credit card authorization service

- interactively authorizing a credit card order that was not authorized in order entry
- correcting order entry errors

Restrictions:

- You cannot apply the [Order Broker Payment Type \(K98\)](#) to an order or change this payment method on an existing order; instead, the screen displays an error, such as Pay type (06-BROKER PAY TYPE) is restricted.
- You cannot delete a credit card payment if it is associated with authorization history; you must deactivate the credit card payment method. The system displays the message: Order payment method cannot be deleted/activity exists.

Enter Payment Methods Screen

Screen structure: The Enter Payment Methods screen is divided into three parts:

- top: displays the order number, the name of the customer who placed the order, and the write-off amount that the customer has overpaid on previous orders that you can apply to the current order.
- center: displays the accumulated order total across all recipient orders and includes fields for you to specify payment information.
- bottom: displays the payment methods already defined for the order. You can change or delete existing payment information on this screen.

**Note:**

Depending on the user's authority to credit card information, the system writes a record to the Credit Card Audit table when this screen is displayed. See Logging Credit Card Data Access in the *Data Security Guide* on My Oracle Support (2953017.1) for more information.

In this topic:

- [Changing a Payment Method](#)
 - [Change Charge Sequence](#)
 - [Enter Cash Control Pop-Up](#)
 - [Enter Credit Card Pop-Up](#)
- [Deactivating a Payment Method](#)
 - [Processing a Refund or Exchange Against a Different Payment Method](#)
- [Adding, Changing and Deleting a Payment Plan on the Order](#)
 - [Adding a Deferred or Installment Payment Plan](#)
 - [Changing a Deferred or Installment Payment Plan](#)
 - [Deleting a Deferred or Installment Payment Plan](#)
- [Performing Online Authorization during Order Maintenance](#)

How to display this screen: Select *Payments* on the [Work with Order Screen in Order Maintenance](#) or the [Work with Order Lines Screen](#).

Field	Description
Order	A unique number the system assigns to identify an order. Numeric, 8 positions; display-only, assigned by the system.
Sold to	The last, first and middle initial of the ship-to customer (the customer who will receive the order). If there is a company name, only this information appears. <i>Last name:</i> The customer's last name. Alphanumeric, 25 positions; display-only. <i>First name:</i> The customer's first name. Alphanumeric, 15 positions; display-only. <i>Initial:</i> The initial of the customer's middle name. Alphanumeric, 1 position; display-only. <i>Company name:</i> The company name. Alphanumeric, 30 positions; display-only.
WO\$ (Write-off dollars)	The accumulated amount of write-offs (overpayments minus underpayments) for this customer that you can apply as payment to the current order by selecting <i>Cvt W/O\$-Paymnt</i> . The system issues a message if you select <i>Cvt W/O\$-Paymnt</i> when the write-off balance is 0 or negative: Cannot use as payment; write-off amount is zero or negative. The system applies the <i>entire amount</i> of the refund/balance due write-off as payment on the order, using the Default Cash Pay Type (C07) . If applying the entire amount of the write-off results in an overpayment on the order, the system issues a refund to the customer. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Pay type	A user-defined code for a method of payment on an order. Payment types are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY) . The pay type code and description display on the lower portion of the screen for payment methods that you have already entered. Numeric, 2 positions; required.
CC #	The number of the credit card used on the order. All credit cards must be authorized manually or by a credit card authorization service. The system holds any unauthorized credit card orders. The system releases these orders once they receive an authorization; or, you can release these orders manually by entering an authorization number in the Authorization # field below.
Exp date	The date up until which the credit card is valid. For example, enter 1226 if the credit card expires in December of 2026. The Require expiration date flag for the pay type controls whether this field is a required entry. Numeric, 4 positions (MMYY format); required or optional, based on the Require expiration date flag for the pay type.

Field	Description
Issue #	An incremental issue number which some banks assign when they replace a credit card, such as a debit card, because it is lost or stolen. It is important to enter the issue number exactly as it appears on the card. For example, an issue number of 0 is different from an issue number of 00, and an issue number of 1 is different from an issue number of 01. <i>Required?</i> An issue number may be required for a credit card or debit card, based on the setting of the Require issue # field for the pay type. If it is required and you do not enter an issue number, the system displays an error message: <pre>Credit card issue# () is not valid.</pre> Note: An entry of 00 (two zeros) is not considered a valid issue number. The issue number is a valid entry only for a credit card payment method, such as a debit card. Alphanumeric, 2 positions; required or optional based on the Require issue # flag for the pay type.
Start date	The month and year when a credit or debit card becomes effective. <i>Required?</i> The Require start date flag for the pay type controls whether the start date is required for a credit card pay type. If the start date is required but not entered, the system displays an error message: <pre>Credit card start date (0) is not valid.</pre> The start date is a valid entry only for a credit card payment method, such as a debit card. Even if you require a start date for a pay type, the system does not validate that the start date is on or before the current date. Typically, if your authorization service requires a start date for this pay type, the service would validate that the start date has passed. Numeric, 4 positions (MMYY format); required or optional based on the Require start date flag for the pay type.
Plan (Deferred or installment payment plan code)	Represents the deferred or installment payment plan assigned to the order. An order is eligible for a payment plan only if it uses a credit card whose Card type is Credit Card rather than, for example, a stored value card. See Types of Credit Cards for more information. This field displays only if the Deferred and Installment Billing (F51) system control value is <i>selected</i>. If you do not have authority to the Override Deferred and Installment Billing Options (A81) secured feature, this field is display-only. An error message indicates if you enter a payment plan code and the order is not eligible. Payment Plans are defined in and validated against the Flexible Payment Option table. See Working with Flexible Payment Options (WFPO). Alphanumeric, 5 positions; optional.

Field	Description
Auth #	Indicates that the charge on this credit card has been approved manually or by a credit card authorization service. You can preauthorize a credit card by entering an authorization number in the Authorization # field; however, you must also enter a dollar value in the Amount field and an authorization date in the Authorization date field. You can enter an authorization number in upper and lower case. <i>Secured feature:</i> The ability to enter a manual authorization is controlled by the secured feature, C/C Authorization Field Access (A25). If you use an authorization service, the system updates this field automatically when an authorization is received. Alphanumeric, 16 positions; optional.
Authorization date	The date when the charge is authorized for this credit card. You must enter an authorization date if you entered an authorization number in the Authorization # field. If you use an authorization service, the system updates this field when an authorization is received. Numeric, 6 positions (in user date format); optional.
Ord total (Order total)	The sum of all charges on the order, including merchandise, freight, additional freight, tax, handling, and additional charges across all recipients (different shipping addresses) on this order. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Auth amount (Authorization amount)	The amount you wish to manually authorize for the credit card. Numeric, 13 positions with a 2-place decimal; optional.
Amount	The total dollar amount of this payment type to apply to the order. <i>When to enter an amount?</i> Enter an amount for cash/check payment types, and for a credit card if it is not the only form of payment on the order or the “catch-all” payment type. Leave this field blank when: - a credit card (including other card types) is the only form of payment for the order, or - a credit card is the “catch-all” payment type. Numeric, 13 positions with a 2-place decimal; entry requirements depend on payment type.
Charge sequence	The order in which the system should charge each pay type when the customer uses several payment types. Defines when each payment type will be billed by the system as merchandise is shipped. See Determining the Charge Sequence for more information. The charge sequence displays for each entered payment method on the lower portion of the screen, and is enterable. Numeric, 2 positions; optional.
SVC ID #	The ID number for the stored value card payment. Define an ID number only if your stored value card processor supports it. Order Administration stores the ID number in the OPM SVC ID Storage field in the Order Payment Method table and includes it in the authorization request and deposit request sent for the stored value card payment. Numeric, 9 positions; optional.

Field	Description
Pay bal (Payment balance)	The amount remaining to charge on an order. The system uses the following calculation to determine the payment balance: $\text{order total} - \text{total order payments} = \text{payment balance}$ This field represents the amount charged to the catch all paytype on a multi-paytype order. <i>Example:</i> The order total = 100.00 Pay type 1 = 45.00 Pay type 2 = 15.00 Pay type 3 (catch all) = 0.00 100.00 - 60.00 = 40.00 (this is the amount charged to the catch all paytype). This amount is a negative value if the customer overpays or a return or exchange is performed. Numeric, 20 positions with a 2-place decimal; display-only.
Routing (Routing number)	Informational. An error message indicates if you enter a routing number for a pay type that does not represent pay category Cash/Check: A routing number cannot be entered for this pay type. Alphanumeric, 9 positions; optional.
Acct (Account #)	Informational. An error message indicates if you enter an account number for a pay type that does not represent pay category Cash/Check: A checking account number cannot be entered for this pay type. Alphanumeric, 20 positions; optional.
Check #	Informational. An error message indicates if you enter a check number for a pay type that does not represent pay category Cash/Check: A check number cannot be entered for this pay type. Numeric, 6 positions; optional.
Ord discount (Order discount)	The total discount applied to the order across all ship to customers. Numeric, 20 positions with a 2-place decimal; display-only.
CC Last 4	The last four positions of the credit card number. Updates the CC Last 4 field in the Order Payment Method table. If you use credit card encryption, the system does not encrypt the value in this field. Alphanumeric, 4 positions; display-only.

Screen Option	Procedure
Add a payment method	Complete the fields at the top of the screen as described above and select <i>OK</i> .
Change a payment method	Select <i>Change</i> for a payment method. See Changing a Payment Method .

Screen Option	Procedure
Delete a payment method	Select <i>Delete</i> for a payment method. If you try to delete a payment method that has already been charged, the system displays a message: Order payment method cannot be deleted/activity exists.
Perform online credit card authorization	Select <i>Auth Online</i> for a credit card payment method that is eligible for online authorization. See Performing Online Authorization during Order Maintenance .
Deactivate a payment method	Select <i>Deactivate</i> for a payment method. See Deactivating a Payment Method .
Review the payment plan assigned to the order	Select <i>Plan Summary</i> for a payment method to advance to the Display Payment Plan Summary Screen .
Review the order payment history for this order	Select <i>History</i> for a payment method to advance to the Display Order Payment History Screen .
Perform an interactive balance inquiry against a stored value card payment method	Select <i>Balance Inquiry</i> for a stored value card payment method. The system interactively performs a stored value card balance inquiry; see Stored Value Card Balance Inquiry (MSVB) . An error message indicates if you enter this option next to a payment method other than stored value card: Pay type not eligible for balance inquiry.
Apply the write-off balance in the WO\$ field as payment on the order, using the Default Cash Pay Type (C07) system control value	Select <i>Convert W/O To Payment</i> .
Apply the negative write-off balance in the WO\$ field as an additional charge on the order, using the value in the Default Additional Charge Code (C45) system control value	Select <i>Convert W/O To Charge</i> .
Accept, validate, and process the order	Select <i>Accept Order</i> ; see Entering Orders . The system evaluates the order to determine if it qualifies for pick slip preparation; see Preparing Orders for Pick Slip Generation and Applying Pick Slip Preparation to an Order .
Reject (cancel) the order	Select <i>Reject Order</i> ; see Entering Orders . The system evaluates the order to determine if it qualifies for pick slip preparation; see Preparing Orders for Pick Slip Generation and Applying Pick Slip Preparation to an Order .
Accept, validate, and process the current order and then place an additional order for this customer for a different shipping address	Select <i>Add Recipient</i> .; see Adding a Recipient Order in Order Maintenance .

Changing a Payment Method

Purpose: You can update an order payment method by selecting *Change* for the payment method at the *Enter Payment Methods Screen in Order Maintenance*. A pop-up window opens automatically, based on the payment category; see below.

Restrictions: You cannot:

- Change the payment to an amount less than what was billed against the pay type.
- Change the expiration date on an existing credit card unless you first deactivate the original credit card and add the new credit card with the new expiration date.
- Change the *Order Broker Payment Type (K98)* on an existing order; instead, the screen displays an error, such as `Pay type (06-BROKER PAY TYPE ) is restricted.`
- Change a payment method that has already billed; instead, the screen displays an error, such as `Pay method (9) cannot be changed -- already billed.`
- Change a credit card payment whose Tokenized field in the Order Payment Method table is *selected*. You must deactivate or delete the original credit card payment and add the credit card payment with the updated information.
- Delete a credit card payment if it is associated with authorization history; you must deactivate the credit card payment method. The system displays the message: `Order payment method cannot be deleted/activity exists.`

Change Charge Sequence

You can also change the charge sequence for a payment method by entering a new number in the [Charge sequence](#) field next to the payment method at the *Enter Payment Methods Screen in Order Maintenance*. See [Determining the Charge Sequence](#) for an overview.

Enter Cash Control Pop-Up

For information on the fields at this pop-up window, which appears when you change a cash/check payment method, see *Enter Payment Methods Screen in Order Maintenance*.

Enter Credit Card Pop-Up

For information on the fields at this pop-up window, which appears when you change a credit card payment method, see [Enter Credit Card For Window \(Credit Card Payment Type\)](#).

Order Orchestration payment: You cannot apply the *Order Broker Payment Type (K98)* to an order; instead, the screen displays an error, such as `Pay type (06-BROKER PAY TYPE ) is restricted.`

Deactivating a Payment Method

Purpose: Use this option to:

- stop any further billing against a credit card used on an order, such as when the credit card is stolen
- add a new payment method for a refund or exchange, so that any credits or charges you process will apply to the new payment method only
- change the expiration date on an existing credit card (you must deactivate the original credit card and add the new credit card with the new expiration date)
- change the credit card number on an existing credit card that has been tokenized (the Tokenized field for the Order Payment Method record is *selected*).

- reimburse a stored value card the charged amount; see [Stored Value Card Authorization Reversal](#)

Select *Deactivate* for the payment method at the *Enter Payment Methods Screen in Order Maintenance* to deactivate it. You receive a message if no payments or authorizations have been applied to the payment method: `Pay method has no activity -- delete instead.`

If the payment method is eligible for deactivation, a pop-up window prompts you to confirm the deactivation. When you select *OK*, the system updates the [Charge sequence](#) (Chg seq) field with a value of 99. You cannot change or reactivate the deactivated payment type.

You receive a message if you deactivate the payment type on a single pay type order, or the “catch-all” payment type on a multiple pay type order: `The only pay method on the order has been deactivated.`

This means that you need to define another method of payment.

You cannot deactivate a credit card with a refund due; instead, you must use the [Work with Refunds Screen](#) to cancel the refund for the order or change the refund type.

Card security value: When you deactivate a credit card that has a card security value and card security presence defined, the system clears the card security value and card security presence from the Order Payment Method table (and Online Authorization table if you performed online credit card authorizations). Otherwise, the system removes the card security value from the order when you accept an order, even if the order has not received an approved online authorization.

Processing a Refund or Exchange Against a Different Payment Method

You can deactivate a payment method at the *Enter Payment Methods Screen in Order Maintenance* in order to:

- process a refund in a different payment type than was used on the order
- charge the customer for an exchange item with a different payment type than was used on the order, if the exchange item costs more than the returned item

For exchanges, the system will process both the refund and the charge for the exchange item in the new payment type.

Instructions:

1. At the *Enter Payment Methods Screen in Order Maintenance*, add the payment method you would like to use for the refund or exchange.
2. Select *Deactivate* for the existing payment method or methods on the order to deactivate. See [Deactivating a Payment Method](#).
3. At the [Work with Order Lines Screen](#), select *Return* for the item you would like to return or exchange or select *Return* to return the entire order. See [Returning and Exchanging Items in Order Maintenance](#).
4. Select *Accept* to accept. If the cost of the exchange item is more than the cost of the returned item, a pop-up window prompts you to select the active pay method for the order.

Select for the active payment method. The system does not allow you to select a deactivated payment method. Select *Accept* to accept the update to the order.

The system will:

- process the return or exchange

- process a refund check or credit in the active payment method
- charge the active payment method, if the exchange item costs more than the returned item.

Adding, Changing and Deleting a Payment Plan on the Order

Purpose: A payment plan is a deferred payment or installment billing option you can offer to your customers. Under a payment plan, you do not bill the customer's credit card until a prearranged interval after you ship the order.

The system allows you to add, change, or delete a payment plan on an order in order maintenance.

Adding a Deferred or Installment Payment Plan

In order to add a payment plan to an order, the system checks to make sure the payment plan is eligible:

- [Deferred and Installment Billing \(F51\)](#) system control value is *selected*.
- order date is within the payment plan's starting and ending date
- order does not contain an item that is excluded from payment plans
- source code on the order is not excluded from payment plans
- order meets the minimum dollar amount requirement
- order meets the pay type requirement
- order includes only one credit card pay type

An error message indicates if you try to add a credit card payment method to an order that already includes a deferred or installment payment plan or if you try to add a credit card associated with a deferred or installment payment plan and the order already includes a credit card: `Multiple credit cards not allowed with payment plan.`

An error message indicates if you try to select a payment plan for the order other than the primary payment plan and you do not have authority to the [Override Deferred and Installment Billing Options \(A81\)](#) secured feature: `Not authorized to override payment plan`

You can add a payment plan by selecting *Change* for a credit card payment method and entering a valid payment plan code in the Pay plan field at the *Enter Payment Methods Screen in Order Maintenance* if no shipments have been made against the order.

If shipments have been made against the order, you must deactivate the original credit card and add a new credit card with a payment plan. The system will use the original credit card for all previous shipments.

See [Entering Orders](#) for more information on how the system assigns a payment plan to the order.

Changing a Deferred or Installment Payment Plan

If no shipments have been made, you can change a payment plan by selecting *Change* for the credit card pay type for the order and entering in a new payment plan code in the Pay plan field at the *Enter Payment Methods Screen in Order Maintenance*.

If shipments have been made, you cannot change the payment plan on the order.

Deleting a Deferred or Installment Payment Plan

If no shipments have been made, you can delete a payment plan from the order by selecting *Change* for the credit card payment method and clearing the payment plan code in the Pay plan field at the *Enter Payment Methods Screen in Order Maintenance*

If shipments have been made, you must deactivate the original credit card on the order and enter a new credit card without a payment plan defined. Previous shipments on the order will continue to use the payment plan for the original credit card unless you change the deposit release date on the *Invoice Pay Summary Screen* in standard order inquiry.

Performing Online Authorization during Order Maintenance

Purpose: You can send and receive electronically the information required to authorize a credit card during order maintenance by selecting *Auth Online* for a credit card payment method that is eligible for online credit card authorization. You would use this option if you are setup to perform online authorization and:

- the credit card was not authorized during order entry due to a communication failure.
- the credit card received a declined authorization during order entry and you wish to resend the card for authorization.
- you added items to the order in order maintenance and wish to authorize the card for the added dollar amount.
- you added a credit card payment method to the order in order maintenance.

Credit cards requiring authorizations less than \$1.00: If the credit card amount to authorize is less than \$1.00 and you have defined an authorization number in the *Authorization Number for Authorizations Under \$1.00 (I08)* system control value, the system does not send the credit card to the service bureau for authorization and instead assigns the authorization number from the system control value to the credit card. If an authorization number is not defined in this system control value, the system sends the credit card to the service bureau for authorization, regardless of the amount that requires authorization.

Performing Online Verification Only: If the *Online Auth Verification Only (I96)* system control value is *selected*, the system processes online authorizations for \$1.00 for the purpose of validating the card. During batch authorizations, the system authorizes the card for the shippable dollar amount and voids the online authorization for \$1.00.

Orders on hold: You can authorize a credit card payment during order maintenance when the order is on hold; regardless of whether the payment is authorized, the order remains on hold.

Authorization messages: A message indicates that a response was received or the payment method you wish to authorize is not eligible for online credit card authorization.

If the message is...	The reason is...
The Pay type must be associated with an online authorization service	The payment method is not a credit card or the credit card payment method is not associated with a service bureau.
Pick Slips Pending - Authorization not possible at this time	Pick slips are pending. If pick slips are pending, you must use the <i>Performing Batch Authorization (SATH)</i> menu option to authorize the credit card.
Authorization delayed by service	Communication failures occurred or you received an undefined response.

If the message is...	The reason is...
Authorization Not Required	The entire dollar amount associated with the card has already received an approved authorization.
Authorization Received	You received an authorization response that does not display the Select Authorization Response Option Window .

For more information: See [Performing Online Credit Card Authorizations](#) for an overview and required setup.

Adding a Recipient Order in Order Maintenance

Purpose: Select this option during order maintenance to add a recipient order for a different address to an existing order.

Retail pickup or delivery orders: You cannot complete entry of a new recipient on a retail pickup or delivery order from Order Orchestration, because you cannot add any items to the order. See the [Order Orchestration Integration](#) for more information.

How to display this screen: Select *Add Recipient* on any of these screens to add a recipient order during order maintenance:

- [Work with Order Screen](#)
- [Work with Order Lines Screen](#)
- [Enter Payment Method Screen](#)

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

In this topic:

- [Adding a Ship-to Suffix to the Order Number](#)
- [Adding a Sold-to Record](#)
- [Linking Orders](#)
- [About Gift Orders](#)
- [Alternating Display of Sold-to/Recipient Addresses](#)
- [Confirm Missing Recipient Window](#)
- [Entering a Recipient Customer](#)

Adding a Ship-to Suffix to the Order Number

When you enter the second order, the system views this as a recipient order, related to the initial order. The system assigns this order (and any subsequent recipient order) the same order number, but increments the shipping suffix by 1 for every additional recipient address on the order.

Adding a Sold-to Record

The system also assigns a sold to customer number to the person or company receiving each recipient order and creates a separate record for each recipient address in the Sold To Customer table. The system updates the recipient customer record with an *R* in the Original mail type field to indicate that the customer was added to the Customer Sold To table as a recipient customer; see [Creating and Updating Sold-to Customers \(WCST\)](#). This code is used for historical purposes to trace how the customer was added to the system.

If the [Update Original Source Code for Recipient Customers \(F90\)](#) system control value is *selected*, the system writes the source code defined for the sold to customer to the Original source field for a recipient customer.

Linking Orders

The system links the Sold To customer's order and any recipient orders by the order number and payment information. You only need to enter payment information for one of the related orders, this information applies to all recipient orders and displays at the [Enter Payment Method Screen](#).

Select *Summary* to review the order totals across all recipients on the order. The Order Totals pop-up window summarizes the individual charges on each recipient order and displays balances for what the customer has purchased, paid and owes. See [Adding a Recipient Order in Order Entry](#).

The system does not capture sales history for any of the recipients.

About Gift Orders

Another type of recipient order is a gift order. You identify an order as a gift order by *selecting* the Gift field. You can then select *Sold To/Rcp.* and enter the address where the gift will be shipped. The gift recipient's address is entered on the same screen you use to enter the address for a recipient order.

As with recipient orders, the system adds a ship-to suffix to the order number to indicate an alternate address. Additionally, the system assigns a sold to customer number to the recipient of the gift order, creates a separate sold-to customer record under this number and updates the Original mail type field with an *R* (recipient) to track how the order was received on the system; see [Creating and Updating Sold-to Customers \(WCST\)](#). If the Update Original Source Code for Recipient Customers (F90) system control value is *selected*, the system writes the source code defined for the sold to customer to the Original source field for a recipient customer.

This makes the gift recipient eligible for future mailings because the customer is already familiar with your product.

A gift order differs from a recipient order because:

- pricing information may not print on the pick slip, depending on your pick slip printing program
- a gift acknowledgment card prints for the customer who placed the order (sold to customer) to confirm that the gift has been shipped

The system performs the same updates as with recipient orders. The system does not capture sales history for the gift recipient.

Alternating Display of Sold-to/Recipient Addresses

Select *Sold To/Rcp.* on the [Work with Order Screen in Order Maintenance](#) to review or enter the buyers (sold to) address or recipient's address. Notice that the addresses of the customer who placed the order (sold to customer) and the customer who will receive the order alternate each time you select *Sold To/Rcp.*

Recipient entry methods: You can enter a recipient order in two ways:

- Select *Accept/Add Rcp.* on the [Work with Order Screen in Order Maintenance](#) or [Work with Order Lines Screen](#).
- Select *Sold To/Rcp.* on the [Work with Order Screen in Order Maintenance](#) if the recipient is a gift order.

Confirm Missing Recipient Window

This pop-up window displays if you select *Accept/Add Rcp.* or *Sold To/Rcp.* to add a recipient and then select *Accept/Add Rcp.* or *Sold To/Rcp.* again without entering a recipient address.

The system is looking for a recipient address. Select OK to override this message and use the sold to address or select *Order Ship To* to enter a recipient address.

When you select *Accept/Add Rcp.* or *Sold To/Rcp.* to add a recipient order, you advance to the [Work with Order Screen in Order Maintenance](#). On this screen, the customer address lines default blank. Here you can:

- Enter the recipient's address information. You advance to the Display Duplicate Sold To pop-up window if the system finds a match to the address you entered (see [Adding a Recipient Order in Order Entry](#)); otherwise, the system creates a new sold to customer record for the address.
- Select *Prompt* on the name or company name fields to advance to the [Entering a Customer Number](#), where you can scan for an existing customer.

Entering a Customer Number

At the [Entering a Customer Number](#), enter a customer number in the Customer field and select OK to select the recipient customer for the order. The address information for the customer defaults in the recipient address lines, but can be updated.

Scanning for a Customer Number

Enter information in any of the scan fields at the [Entering a Customer Number](#) to locate a customer for the recipient address if you do not know the customer number.

A message displays when you select an existing customer address to default into the recipient address fields on the [Work with Order Screen in Order Maintenance](#):

Customer (46) has been updated with changes!

This message indicates that the order has been updated with the recipient address.

Entering a Recipient Customer

Purpose: You can enter the recipient's address information in the address fields on the Work with Order screen for the recipient order.

How to display this screen: Select *Recipient.* at the [Work with Order Screen in Order Maintenance](#) to enter a gift recipient's address, or select *Add Recipient* to enter a recipient order shipping to a different address.

How to complete this screen: To complete the recipient address information, you can:

- Type the recipient's information in the address fields.
- If the recipient customer is an existing customer, you can *click* on the arrow in the recipient address fields to select the customer from one of the Select Customer Sold To scan screens. See [Select Customer Sold To Pop-up Window](#).

See [Work with Order Screen in Order Maintenance](#) for field descriptions and options.

The system verifies that the ship via (carrier) used on the previous order is still valid for the recipient address.

Entering changes for a recipient: You can change any order information for a recipient order. For example, you can select a different shipping service. Any other recipient orders are not updated.

For a multi-recipient order (entering an order for a customer and a friend), the updates you make affect only the current recipient order. Additionally, you update the recipient customer when you update any of the customer-specific fields on the recipient screen.

Shipping restrictions: If one or more items on the order is restricted from being shipped to the state or country of the ship to address you have selected, a message indicates:

One or more items on the order line are restricted to new Shipping country/state.

See [Entering Additional Item Information](#), for information on item/state restrictions.

Maintaining Quotes in Order Maintenance

Purpose: Quote Maintenance allows you to update an existing quote by:

- Changing customer, quote, item, or payment information
- Adding a payment type
- Adding an item
- Deleting an item
- Canceling a quote
- Holding or releasing a line
- Repricing items on the quote and applying discounts and promotions to a quote; see [Order Repricing, Premiums, Discounts, and Promotions](#) and [Changing Item Detail Line Information in Quote Maintenance](#)
- Recalculating the freight on the quote if the [Override Freight on Quote Conversion \(K76\)](#) system control value is *unselected*.
- Recalculating the order totals based on the changes you have made in quote maintenance

Additionally, you can select Quote Maintenance to review quote history.

In this topic:

- [How is Quote Maintenance Different from Order Maintenance?](#)
- [Selecting a Quote for Maintenance](#)
- [Work with Order Screen in Quote Maintenance](#)
- [Changing Item Detail Line Information in Quote Maintenance](#)
- [Enter Payment Methods Screen in Quote Maintenance](#)

- [Completing Quote Maintenance](#)
- [Cancelling a Quote through Order Maintenance](#)

For more information: See:

- [Entering Pre-Order Quotes](#) for an overview, the required setup, and how to create a quote.
- [Cancelling a Quote through Order Maintenance](#) for more information on how to cancel a quote.
- [Converting Quotes to Orders](#) for more information on the updates the system performs when you convert a quote to a regular order.

How is Quote Maintenance Different from Order Maintenance?

You use the same screens in quote maintenance as you do in order maintenance. However, the system displays the screens for a quote in Review mode. When you convert the quote to an order, the system displays the screens in maintenance mode.

Unlike standard orders:

- Because the system does not reserve items on quotes, adding an item to a quote does not guarantee that the item will be available when the customer is ready to order. When you convert a quote to an order, the system reserves inventory and displays the [Unavailable quoted order lines screen](#), listing the items on the quote that are not available because they are on backorder or are soldout.
- You can have only one ship to customer on a quote, and all of the items on a quote must ship to the same address.
- The price of each item on a quote is not guaranteed unless you enter a price override reason code in the [Price Override Reason for Quotes \(K75\)](#) system control value. The system assigns this price override reason code to each order line that does not already have a price override reason code defined when you accept the quote. **Note:** Before you convert a quote to an order, the system allows you to reprice and apply any discounts or promotions to the lines on a quote that do not have a price override reason defined; if the totals for a quote change during quote maintenance, you should resend a Quote Confirmation or Quote form to the customer to indicate the new estimated order totals.
- The freight charges on a quote are not guaranteed unless you select the [Override Freight on Quote Conversion \(K76\)](#) system control value.
- You cannot express bill any items on a quote.
- You cannot apply a pre-paid pay type to a quote.
- You cannot perform a return or exchange.
- You can perform end-of-order repricing, promotional pricing, and add free gifts; however, the updates apply only to lines that do not contain a price override reason code.
- The system does not reduce inventory or update demand until you convert a quote to an order.
- The system does not perform any credit or fraud checking until you convert a quote to an order.

See [Quote Restrictions](#) for additional functionality that is not available on a pre-order quote.

Similar to order maintenance, quote maintenance does not allow you to:

- Display Upsell Promotions pop-up windows.
- Let you change a payment method if it has been charged.

- Let you change the source code to a source code for a different offer.
- Let you change the customer sold to or ship to number.
- Let you advance to the Order Recap screen.

Order history message: When you maintain a quote, the system creates an order history message, indicating the date the quote was maintained, the new order total, and the user ID of the person that maintained the quote; for example: 10/29/09 MAINT Quote was maintained 277.95 KBROWN. See [Display Order History Screen](#).

Selecting a Quote for Maintenance

You can advance to quote maintenance as you would advance to maintenance for any standard order:

- Select *Maintain* from the standard Order Inquiry screens.
- Select *Order Maint* from the Order Entry Customer Selection screen.
- Select *Maintenance* from the Customer Selection CTI screen.

Use the [Order Maintenance Selection Screen](#) to find the quote you wish to maintain, using information you have about either the quote or the customer. Select *Quote* in the Order Status field to restrict your search criteria to quotes only. See [Selecting an Order for Maintenance](#) for more information on the fields on this screen.

Cannot Maintain Order window: The system advances you to the [Cannot Maintain Order Window](#) if you select to maintain a canceled quote. In this situation, the system does not allow you to enter quote maintenance to maintain the quote.

Work with Order Screen in Quote Maintenance

Use the [Work with Order Screen](#) to maintain customer and header information on the quote.

Printing order header messages on the Quote form: You can flag an order header message to print on the [Quote Form](#) by selecting *Quote* in the Print field for the message. The first four order header messages whose Print flag is set to *Quote* print on the form.

Recipient customers on quotes: You cannot add multiple ship to customers to a quote. If you select *Accept/Add Recip* for a quote, the system displays an error message: Add recipient not allowed with Quote.

Work with Order Ship to Properties screen: When you accept a quote:

- The system *selects* the Quote origin field on the [Work with Order Ship to Properties Screen](#) to indicate the order is a pre-order quote. You cannot change this field in quote maintenance.
- The system applies the freight and additional freight charges on the quote as a freight override if the *Override Freight on Quote Conversion (K76)* system control value is *selected*. You can review the freight and additional freight charges on the quote in the Freight override field on the [Work with Order Ship to Properties Screen](#). If you wish to recalculate the freight for the quote, you can remove the freight override amount; the system recalculates the freight when you accept the quote and applies the new freight charges as a freight override.

Field descriptions and screen options: See [Work with Order Screen](#) for a description of the fields and the options available on this screen.

The fields below describe information on the Work with Order screen that applies specifically to Quote maintenance. See [Work with Order Screen in Order Maintenance](#) for more information on the fields you can change that are not specific to Quote maintenance.

Field	Description
Ship via	You cannot enter an express bill ship via code on a quote. The shipper update on the quote header screen affects all items except those with a ship via override.
Salesrep	Any <i>Quote Form</i> or Quote Confirmation generated after you update this field includes the new salesman number.
Type Order type	If you change the order type to an order type whose Quote field is also <i>selected</i>, the system: - Recalculates the cancel date for the quote and each item on the quote, based on the number defined in the Expiration days field for the new order type. If an Expiration days has not been defined for the new order type, the system removes the cancellation date from the quote. See Cancelling a Quote through Order Maintenance. - Requires a pay method for the quote, based on the setting of the Pay method required field for the new order type. If you change the order type to an order type whose Quote field is <i>unselected</i>, the system converts the quote to an order; see Converting Quotes to Orders.
Hold reason	If you enter a hold reason, the system places the entire quote on hold; however, the status of the Quote remains <i>Quote</i>. If you convert the quote to an order, the system retains the hold reason and updates the status of the order to <i>Held</i>.
Calc freight	The system suppresses all freight charges for new items (including freight and additional freight) when you deselect this field. If service charges by ship via would normally apply, the system suppresses these as well.

 Note:

The system does not calculate freight for new items you add to the quote when this field is *unselected*; the system charges the customer any freight previously calculated for existing order detail lines if using a line-level freight method.

The [Recalculate Freight Default \(F62\)](#) system control value controls the default setting of this field.

The setting of the [Override Freight on Quote Conversion \(K76\)](#) system control value controls whether the freight and additional freight charges on a pre-order quote are used as a freight override when the quote is converted to a regular order.

Field	Description
Arrival date	The system updates each item on the quote automatically with the new arrival date. Regardless of the arrival date, the system does not reserve inventory on quotes. The system reserves inventory when the quote is converted to an order; see Converting Quotes to Orders. If a number of days has been entered in the Expiration days field for the order type on the quote, the system assigns a cancel date to the quote and each line on the quote, indicating when the quote is no longer valid and should be cancelled. The system uses the following calculation to assign a cancel date to a quote: $\text{Quote arrival date} + \text{Order type Expiration dates} = \text{Quote expiration date}$ The system stores the quote expiration date in the Cancel date field in the Order Header table and Order Detail table.

 Note:

The cancel date cannot be earlier than the arrival date: Cancel date cannot be earlier than arrival date.

Cancel date

If a number of days has been entered in the [Expiration days](#) field for the order type on the quote, the system assigns a cancel date to the quote and each line on the quote when you accept the quote. The cancel date indicates when the quote is no longer valid; see [Assigning an Expiration Date to a Quote](#).

The system uses the following calculation to assign a cancel date to a quote:

$$\text{Quote arrival date} + \text{Order type Expiration dates} = \text{Quote expiration date}$$

If you manually enter a date in the Cancel date field on the Work with Order screen, the system uses this date instead of the calculated quote expiration date.

 Note:

The cancel date cannot be earlier than the arrival date: Cancel date cannot be earlier than arrival date.

Order Cancellation List

Once the cancel date has been reached the quote prints on the [Order Cancellation List](#). Customer Service uses this list to contact each customer to see if the deadline can be extended. If not, Customer Service must use Order Maintenance to cancel the quote. See [Cancelling a Quote through Order Maintenance](#).

Changing Item Detail Line Information in Quote Maintenance

Purpose: Use the Work with Order Lines screen to:

- review information about items on the quote
- make changes and additions
- delete a line
- review quote line history

The system does not reserve inventory for order lines on a quote. The system performs inventory reservation when the quote is converted to an order. See [Converting Quotes to Orders](#).

Changing a set component item: You cannot change, cancel, delete, or sell out a set component item if you do not have the required authority under the [Set Component Maintenance \(J01\)](#) secured feature. See that secured feature for more information.

Adding an item in quote maintenance: Use the [Work with Order Line Screen](#) to add another item to an existing quote and enter item-level overrides. You can also add an item by entering the information on the blank order line in the center of the [Work with Order Lines Screen](#). The system:

- Assigns the next available line number to the item you are adding to the quote.
- Assigns the cancel date on the quote header to the item.
- Performs the same item validations as in Quote Entry; see [Adding Items to a Quote](#).

Enter Add Reason window: Regardless of the setting of the [Require Reason for Lines Added in Order Maintenance \(D75\)](#) system control value and Require reason code field for an item offer or SKU offer, the system does not advance you to the [Enter Add Reason Window](#) when you add an item to a quote in Quote maintenance.

Deleting an item in quote maintenance: Select *Delete* for an order line to remove it from the quote. If you delete a membership item from a quote, the system also deletes the customer membership.

Repricing an existing line in quote maintenance: You can select *Reprice* during quote maintenance to reprice the quote and apply any qualifying discounts, premiums, and promotions to the quote; however, the system does not reprice any lines that contain a price override reason code. If you wish to reprice these lines, you must remove the price override reason code from the line. The system reprices lines that do not contain a price override reason code using regular pricing logic. **Note:** If you maintain a quote after printing the Quote form or generating the Quote Confirmation email, and the estimated order totals for the quote change as a result of your changes, you should use the [Print/Email Quote Window](#) to resend the Quote form or Quote Confirmation to the customer so that the customer has the most recent estimated totals for the quote.

Accompanying item: The system adds an accompanying item to the order if the selected item has been associated with one through the [Work with Accompanying Item Screen](#), and if the [Add Accompanying Items in Order Maintenance \(H28\)](#) system control value is selected. **Note:** If you update the originating item in quote maintenance, the system does not update the accompanying item. For example, if you sell out the originating item in quote maintenance, the system does not also sell out the accompanying item.

Returns: You cannot process returns or exchanges in quote maintenance.

Recipient customers on quotes: You cannot add multiple ship to customers to a quote. If you select *Accept/Add Recip* for a quote, the system displays an error message: Add recipient not allowed with Quote.

Customer profile: The system advances automatically to the [Work with Customer Profile Screen](#) if you need to obtain mandatory demographic information for a customer, if the [Prompt for Mandatory Demographics in Order Maintenance \(E60\)](#) system control value is selected.

Field descriptions and screen options: See [Working with Items on the Order](#) for a description of the fields and the options available on this screen.

The fields below describe information on the Work with Order Lines screen that applies specifically to Quote maintenance. See [Changing Item Detail Line Information in Order Maintenance](#) for more information on the fields you can change that are not specific to Quote maintenance.

Field	Description
Qty	You cannot enter an item for a negative quantity on a quote: Negative quantity not allowed on quote. When you change the quantity ordered of a main set item, the change is also reflected in its component items.
Price	The system calculates the price of an item by taking into account any price breaks and source or order discounts, and uses the pricing routine (pricing hierarchy) in the Pricing Values (B31) system control value to determine the price of the item on the order line. If you override the price for an existing order line, you must enter a price override reason code in the Ovr field. The Price Overrides (A23) secured feature controls whether you can update the price defined for the order line; if you do not have authority to this secured feature, the Price field is display-only. User and user class security determine whether you can perform a price override. You can also define a maximum percentage operators can discount an item by entering a percentage in the Price Override Limit Percent (E55) system control value. You can select <i>Reprice</i> during quote maintenance to reprice the quote and apply any qualifying discounts, premiums, and promotions to the quote; however, the system does not reprice any lines that contain a price override reason code. If you wish to reprice these lines, you must remove the price override reason code from the line. The system reprices lines that do not contain a price override reason code using regular pricing logic.

 Note:

If you maintain a quote after printing the Quote form or generating the Quote Confirmation email, and the estimated order totals for the quote change as a result of your updates, you should use the [Print/Email Quote Window](#) to resend the Quote form or Quote Confirmation to the customer so that the customer has the most recent estimated totals for the quote.

Field	Description
Ovr	The price override reason code assigned to the order line. If you have the authority, you can override the price of an item and specify a price override reason code. When you accept a quote, the system assigns the price override reason code defined in the Price Override Reason for Quotes (K75) system control value to each detail line so that the quoted price for each item is retained. However, the system allows you to remove the price override reason and update the price of a line in quote maintenance. You can select <i>Reprice</i> during quote maintenance to reprice the quote and apply any qualifying discounts, premiums, and promotions to the quote; however, the system does not reprice any lines that contain a price override reason code. If you wish to reprice these lines, you must remove the price override reason code from the line. The system reprices lines that do not contain a price override reason code using regular pricing logic.
Frt	This field does not display in Quote Maintenance, regardless of the settings of the <i>Override Freight on Quote Conversion (K76)</i> and <i>Recalculate Freight Default (F62)</i> system control values.
Ship via	You cannot enter an express bill ship via code on a quote.
Arr date	Regardless of the arrival date, the system does not reserve inventory on quotes. The system reserves inventory when the quote is converted to an order; see Converting Quotes to Orders.

 Note:

If you maintain a quote after printing the Quote form or generating the Quote Confirmation email, and the estimated order totals for the quote change as a result of your updates, you should use the [Print/Email Quote Window](#) to resend the Quote form or Quote Confirmation to the customer so that the customer has the most recent estimated totals for the quote.

 Note:

The cancel date for the quote cannot be earlier than the arrival date: Cancel date cannot be earlier than arrival date.

Field	Description
Cancel date	If a number of days has been entered in the Expiration days field for the order type on the quote, the system assigns a cancel date to the quote and each line on the quote when you accept the quote. The cancel date indicates when the quote is no longer valid; see Assigning an Expiration Date to a Quote. If you manually enter a date in the Cancel date field on the Work with Order screen, the system overrides the date you entered with the calculated quote expiration date. The system recalculates the quote cancellation date when you accept the quote in Quote Maintenance only if you changed the order type on the quote to another order type whose Quote field is <i>selected</i> and whose Expiration days is different from the expiration days defined for the original order type on the quote.

 Note:

The cancel date cannot be earlier than the arrival date: Cancel date cannot be earlier than arrival date.

Order Cancellation List

Once the cancel date has been reached the quote prints on the *Order Cancellation List*. Customer Service uses this list to contact each customer to see if the deadline can be extended. If not, Customer Service must use Order Maintenance to cancel the quote. See [Cancelling a Quote through Order Maintenance](#).

Enter Payment Methods Screen in Quote Maintenance

Purpose: Use the [Enter Payment Methods Screen](#) to apply a payment to the quote or to change existing payment information.

 Note:

The Enter Payment Methods screen is the only screen where you can enter payment information in Quote Maintenance.

Payment method required? The [Pay method required](#) field for the order type on the quote defines whether a pay type is required on a quote.

- If the Pay method required field is *selected*, the system requires you to enter a pay type on a quote before the quote can be accepted.
- If the Pay method required field is *unselected*, the system does not require a pay type on a quote. A pay type is not required until the quote is converted to an order.

The system performs the same pay type validation as in standard order entry; see [Pay Type Editing](#).

Cash/check pay type: You cannot enter a cash/check pay type on a quote. You can add a cash/check pay type when the quote is converted to a regular order.

Adding, changing, and deleting a payment plan to a quote: The system allows you to add, change, or delete a payment plan on a quote in quote maintenance.

- In order to add a payment plan to a quote, the system checks to make sure the payment plan is eligible; see [Adding a Deferred or Installment Payment Plan](#).
- You can change a payment plan by selecting *Change* for the credit card pay type for the quote and entering in a new payment plan code in the Pay plan field at the Enter Payment Methods screen.
- You can delete a payment plan from the quote by selecting *Change* for the credit card payment method and clearing the payment plan code in the Pay plan field at the Enter Payment Methods screen.

Performing online authorization during quote maintenance: You can send and receive electronically the information required to authorize a credit card during quote maintenance by selecting *Auth Online* for a credit card payment method that is eligible for online credit card authorization. You would use this option if you are setup to perform online authorization and:

- the credit card was not authorized during quote entry due to a communication failure.
- the credit card received a declined authorization during quote entry and you wish to resend the card for authorization.
- you added items to the quote in quote maintenance and wish to authorize the card for the added dollar amount.
- you added a credit card payment method to the quote in quote maintenance.

See [Performing Online Authorization during Order Maintenance](#) for more information.

Recipient customers on quotes: You cannot add multiple ship to customers to a quote. If you select *Accept/Add Recipient* for a quote, the system displays an error message: Add recipient not allowed with Quote.

Field descriptions: See [Enter Payment Methods Screen](#) for field descriptions and options available on this screen.

The fields below describe information on the Enter Payment Methods screen that applies specifically to Quote maintenance. See [Enter Payment Methods Screen in Order Maintenance](#) for more information on the fields you can change that are not specific to Quote maintenance.

Field	Description
Pay type	You cannot enter a cash/check pay type on a quote. You can add a cash/check pay type when the quote is converted to a regular order.

Field	Description
Plan (Deferred or installment payment plan code)	Represents the deferred or installment payment plan assigned to the quote. When you convert the quote to an order, the system updates the deferred bill date or installment bill dates. A quote is eligible for a payment plan only if it uses a credit card whose Card type is Credit Card rather than, for example, a stored value card. See Types of Credit Cards for more information. This field displays only if the Deferred and Installment Billing (F51) system control value is <i>selected</i>. If you do not have authority to the Override Deferred and Installment Billing Options (A81) secured feature, this field is display-only. An error message indicates if you enter a payment plan code and the quote is not eligible. Payment Plans are defined in and validated against the Flexible Payment Option table. See Working with Flexible Payment Options (WFPO).

Completing Quote Maintenance

Select *Accept Order* to accept your changes to the quote, or select *Reject Order* to exit the quote without saving your changes.

When you accept your changes to the quote, the system:

- If you changed the Arrival date and a number of days has been entered in the [Expiration days](#) field for the order type on the quote, recalculates the cancel date assigned to the quote header and each item on the quote; see [Assigning an Expiration Date to a Quote](#). In addition, assigns the expiration date to each new line added in quote maintenance.
- Assigns the price override reason defined in the *Price Override Reason for Quotes (K75)* system control value to each detail line that does not already have a price override reason defined.
- Applies the freight and additional freight charges to the Freight override field on the [Work with Order Ship to Properties Screen](#) if the *Override Freight on Quote Conversion (K76)* system control value is *selected* and you cleared the Freight override field during quote maintenance.
- If you changed the order type to an order type whose Quote field is also *selected*, the system:
 - Recalculates the cancel date for the quote and each item on the quote, based on the number defined in the Expiration days field for the new order type. If an Expiration days has not been defined for the new order type, the system removes the cancellation date from the quote. See [Cancelling a Quote through Order Maintenance](#)
 - Requires a pay method for the quote, based on the setting of the Pay method required field for the new order type.
- Creates an order history message, indicating the date the quote was maintained, the new order total, and the user ID of the person that maintained the quote; for example: 10/29/09 MAINT Quote was maintained 277.95 KBROWN. See [Display Order History Screen](#).
- Advances you to the [Print/Email Quote Window](#), where you can select to print the *Quote Form* or generate the Quote Confirmation email.

Resending the Quote form or Quote Confirmation: If you maintain a quote after printing the Quote form or generating the Quote Confirmation email, and the estimated order totals for the quote change as a result of your changes, you should use the [Print/Email Quote Window](#) to

resend the Quote form or Quote Confirmation to the customer so that the customer has the most recent estimated totals for the quote.

Converting a quote to an order: If you change the order type to an order type whose Quote field is *unselected*, the system converts the quote to an order; see [Converting Quotes to Orders](#).

Cancelling a Quote through Order Maintenance

You can use the *Order Cancellation List* to determine which quotes to cancel.

You can cancel the entire quote by selecting *Cancel Order* on the [Work with Order Screen in Order Maintenance](#) or the [Work with Order Lines Screen](#) in order maintenance.



Note:

You cannot cancel individual items on a quote. If you wish to cancel an item on the quote, select *Delete* for the item in order maintenance to remove the order line from the quote.

Enter Cancel Reason Window

To cancel: Select *Cancel Order* at the [Work with Order Screen in Order Maintenance](#) to display the Confirm Cancel window. If you select *OK* at this window, you advance to the Enter Cancel Reason window.

Field	Description
Order#	The number of the quote you wish to cancel. Numeric, 9 positions; display-only; assigned by the system.
Ship to number (unlabeled field to the right of the quote number)	The ship to number for the quote you wish to cancel. Because quotes can have only one ship to customer, this number is always 1. Numeric, 3 positions; display-only; assigned by the system.
Cancel reason	The reason for canceling the entire quote. Cancel reason codes are defined in and validated against the Cancel Reason table; see Establishing Cancel Reason Codes (WCNR) .



Note:

The system does not reduce demand, regardless of the Reduce demand setting for the selected cancel reason code since the system does not include quotes in initial demand tracking.

Quote Updates for Cancellation

The system performs these updates when you cancel a quote.

Order Header: The system updates the status of the quote to *X Closed*.

Order Ship To: The system updates:

- The status of the ship to on the quote to *X Closed*.
- The Cancel date for the ship to on the quote to the date the quote was canceled.

Order Detail: The system updates:

- The status of each open order line on the quote to *X Closed*.
- The Cancel date for each order line on the quote to the date the quote was canceled.
- The Cancel reason for each order line on the quote to the cancel reason code entered on the Enter Cancel Reason window.
- Does not update the Quantity cancelled for the order lines on the quote in order to separate canceled quotes from canceled orders.

Order history: When you cancel a quote, the system creates an order history message, indicating the date the quote was canceled, the cancel reason code, and the user ID of the user that canceled the quote; for example: 11/04/09 CANCEL Quote was canceled. Reason code: 1 KBROWN

Order line history: The system creates an order line history transaction indicating the item on the quote was canceled.

Order maintenance: The quote remains on the system for inquiry purposes; once a quote has been canceled, you can no longer perform any maintenance activity against the quote. The Cannot Maintain Order window displays if you try to access order maintenance for the quote indicating the canceled quote cannot be maintained.

Customer membership: If you cancel a quote that is associated with a customer membership, the system also cancels the customer membership.

Demand: The system does not reduce demand, regardless of the Reduce demand setting for the selected cancel reason code since the system does not include quotes in initial demand tracking.

Converting Quotes to Orders

Purpose: Quote conversion allows you to convert a pre-order quote into a regular order.

To convert:

1. Advance to order maintenance for the quote you wish to convert.
2. Optionally, perform any updates to the quote, such as adding or removing a line and performing any pricing updates; see [Maintaining Quotes in Order Maintenance](#).
3. On the Order Header screen, change the Order type field for the quote to an order type whose Quote field is *unselected*.
4. Optionally, perform any updates to the order; see [Performing Order Maintenance](#).
5. Optionally, enter a payment method on the order. The order may not have a payment method if the Pay method required field for the order type on the converted quote is *unselected*. **Note:** When you convert a quote to an order, the system will perform online authorization for eligible payment methods only if the [Authorize Full Amount During Order Entry \(G99\)](#) system control value is selected. See [Performing Online Credit Card Authorizations](#).
6. *Accept or Reject* the converted order.
7. If you accept the converted order, the system displays the [Unavailable Quoted Order Lines Screen](#) if any of the items on the converted order are on backorder or soldout.

See [Quote Conversion Updates](#) for the updates the system performs when you convert a quote to an order.

Changing to a different quote order type: If you change the order type on a quote to another order type whose Quote field is *selected*, the system does not convert the quote to an order. The quote remains a quote. The system:

- Recalculates the cancel date for the quote, based on the number defined in the Expiration days field for the new order type. See [Cancelling a Quote through Order Maintenance](#).
- Requires a pay method for the quote, based on the setting of the Pay method required field for the new order type.

In this topic:

- [Unavailable Quoted Order Lines Screen](#)
- [Quote Conversion Updates](#)

For more information: See:

- [Entering Pre-Order Quotes](#) for an overview, the required setup, and how to create a quote.
- [Maintaining Quotes in Order Maintenance](#) for more information on the updates you can make to a quote before it is converted to an order.
- [Cancelling a Quote through Order Maintenance](#) for more information on how to cancel a quote.

Unavailable Quoted Order Lines Screen

Use this screen to review the items on a converted quote that are not available because they are on backorder or are soldout.

How to display this screen: In quote maintenance, change the Order type field for the quote to an order type whose Quote field is *unselected* and select *Accept*. This screen does not display if none of the items on the converted quote are on backorder or are soldout.

Field	Description
Order #	The order number for the converted quote that contains items that are on backorder or are soldout. Numeric, 9 positions; display-only.
Ship to # Unlabeled field next to Order # field	The ship to number for the converted quote that contains items that are on backorder or are soldout. Numeric, 3 positions; display-only.
Lin Order line number	The line on the converted quote that contains the item that is on backorder or is soldout. Numeric, 3 positions; display-only.
Item	A code for the item on the converted quote that is on backorder or soldout. Alphanumeric, 12 positions; display-only.
SKU	A code for the SKU of the item on the converted quote that is on backorder or soldout. Alphanumeric, three 4-position fields; display-only.
Description	A description of the item. Alphanumeric, 25 positions; display-only.

Field	Description
Ord Ordered quantity	The number of units of the item ordered on the order line. Numeric, 5 positions; required.
Rsv Reserved quantity	The number of units of the item reserved on the order line. See Influences on Reservation . Numeric, 5 positions; display-only.
B/O Backordered quantity	The number of units of the item on backorder on the order line. Numeric, 5 positions; display-only.
S/O Soldout quantity	The number of units of the item that are soldout on the order line. Numeric, 5 positions; display-only.

Quote Conversion Updates

- [Quote Conversion Immediate Updates](#)
- [Quote Conversion Updates During Background Processing](#)

Quote Conversion Immediate Updates

The system performs the following updates immediately when you convert a quote to an order.

Update	Made When?
Cancel date	The system removes the cancel date defined on the order header and for each order line.
Order date and arrival dates	The system updates the order date and arrival date on the order to the date the quote is converted to an order. The system does not update the entered date so that you can track the date when the quote was created.
Order type	The system updates the Order type field on the Work with Order screen for the converted order to display-only.
Inventory reservation	The system performs inventory reservation against all qualifying lines on the quote. Once the quote is converted to an order, you should manually review the lines on the order to determine if there are any items on backorder or that are soldout based on inventory availability at the time of quote conversion. Any items that are on backorder or are soldout display on the Unavailable Quoted Order Lines Screen .
Soldout items	When you convert a quote to an order that contains a soldout item, the item remains soldout; the system does not reevaluate soldout order lines based on current inventory status. In order to reevaluate soldout order lines during quote conversion, you will need to delete the existing soldout order line and add a new order line to the order for the item that is soldout.
Price override reason for quotes	The system uses regular pricing logic to reprice each line on the quote that does not have a price override reason defined.
Held quotes	If you convert a held quote to an order, the system retains the hold reason defined in the Hold reason field on the Work with Order Screen and updates the status of the order to <i>Held</i> .

Update	Made When?
Freight charges	The system looks at the setting of the Override Freight on Quote Conversion (K76) system control value to determine whether the freight and additional freight charges on a pre-order quote are used as a freight override when the quote is converted to a regular order. - If this system control value is <i>selected</i>, the system carries over the freight and additional freight charges on the pre-order quote when the quote is converted to a regular order. You can review the freight and additional freight charges in the Freight override field on the Work with Order Ship to Properties Screen. Note: If a freight override amount exists, the system does not automatically recalculate freight. For example, if you cancel a line on the converted order, the system will not recalculate freight based on the changed order total. In order to recalculate freight for the converted order, you must remove the freight override amount and change an order line. - If this system control value is <i>unselected</i>, the system does not retain the freight and additional freight charges on a pre-order quote when the quote is converted to a regular order. The system re-calculates the freight and additional freight charges when the quote is converted to a regular order.
Membership items	If the converted quote contains a membership item, the system displays the Order Total Window (Reviewing the First Order Total), where you can review the estimated dollar total of the first order you will generate for the membership, and updates the status of the customer membership to active.
Order Orchestration	When you convert a quote to an order, the system automatically sends eligible backordered lines to the Order Orchestration module in Order Orchestration for fulfillment. See Order Orchestration Integration.
Payment	The system validates that a payment method exists on the order. If a payment method does not exist, the system requires one.
 Note: When you convert a quote to an order, the system will perform online authorization for eligible payment methods only if the Authorize Full Amount During Order Entry (G99) system control value is selected. See Performing Online Credit Card Authorizations.	
Order history	When you convert a quote to an order, the system creates an order history message, indicating the date the quote was converted, the order total of the quote at the time of conversion, and the user ID of the user that converted the quote to an order; for example: 11/04/09 CONVERT Quote was converted to an order 301.29 KBROWN
Pick Slip Preparation	When you convert a quote to an order, the system evaluates the order to determine if it qualifies for pick slip preparation. See Preparing Orders for Pick Slip Generation and Applying Pick Slip Preparation to an Order.

Update	Made When?
Order Async	The system sends the converted order to the order async for background updates.
Deferred or installment payment plan	When you convert the quote to an order, the system updates the deferred bill date or installment bill dates. <i>Deferred payment plan example:</i> On 11/10/09, you enter a quote and apply a deferred payment plan to the credit card pay type on the quote. When you accept the quote, the system assigns a deferred bill date of 12/20/09 to the quote (based on a 30 day deferral). On 11/12/09, you convert the quote to an order. When you accept the converted order, the system updates the deferred bill date to 12/22/09. <i>Installment payment plan example:</i> On 11/10/09, you enter a quote and apply an installment payment plan to the credit card pay type on the quote. When you accept the quote, the system assigns the following installment bill dates to the quote: 11/10/09 and 12/10/09. On 11/12/09, you convert the quote to an order. When you accept the converted order, the system updates the installment bill dates to 11/12/09 and 12/12/09.

Quote Conversion Updates During Background Processing

The system performs the balance of the field and table updates during a background processing job (Order ASYNC) that runs after you accept the converted quote. See [Updates During Background Processing](#) for a detailed listing.

See [Performing the Release](#) and [Introducing Order Hold Reason Codes](#) for more information about the credit check process that evaluates customers, orders, and payment types and performs record updates if any condition on the order fails a credit check.

Process	Table	Field
Update the Item/Warehouse for each item ordered	Item Warehouse	ITW B/O qty Reserve qty Special handling reserve quantity ITW On order qty
Update the SKU for each item ordered	SKU	Orders availability pick generation Open quantity On-hold quantity
Update the order detail data queue for each item ordered	Order Detail Data Queue	Qty ordered Qty soldout Original price Price Price override code
Update order line history	Order Line History	
Update order ship to data queue	Order Ship To Data Queue	The system creates the record using the order date (the date the quote was converted to an order), rather than the entry date (the date the quote was created).
Update order transaction history	Order Transaction History	

Process	Table	Field
Update reserved order lines	Reserved Order Lines	
Evaluate order for refunds; create refund records for overpayments or balance dues	Refunds	All fields
<i>Credit check:</i> sold-to customer unconditional hold	Order Header SKU	Order header/order hold reason system hold reason On-hold quantity
<i>Credit check:</i> sold-to customer fraud	Order Header Order Header SKU	Order header order status Order header/order hold reason system hold reason On hold qty
<i>Credit check:</i> sold-to customer zip code fraud	Order Header Order Header SKU	Order header order status Order header/order hold reason system hold reason On-hold quantity
<i>Credit check:</i> bill-to customer unconditional hold	Order Header SKU	Order header/order hold reason system hold reason On-hold quantity
<i>Credit check:</i> bill-to customer zip code fraud	Order Header SKU	Order header/order hold reason system hold reason On-hold quantity
<i>Credit check:</i> ship-to/ sold-to customer fraud	Order Ship To Order Header Order Ship To SKU	Order ship to/order hold reason hold reason Order header/order hold reason system hold reason Order ship to order status On-hold quantity
<i>Credit check:</i> ship-to/ sold-to customer zip code fraud	Order Ship To Order Header SKU	Order ship to order status Order header/order hold reason system hold reason On-hold quantity
<i>Credit check:</i> ship-to customer fraud	Order Ship To Order Header SKU	Order ship to order status Order header/order hold reason system hold reason On-hold quantity
<i>Credit check:</i> ship-to customer zip code fraud	Order Ship To Order Header SKU	Order ship to order status Order header/order hold reason system hold reason On-hold quantity
<i>Credit check:</i> email address fraud	Order Header Order Ship To SKU	OHR Hold reason OHD OHR Sys hold reason SKU On hold qty
<i>Credit check:</i> dollar hold	Order Header SKU	Order header/order hold reason system hold reason On-hold quantity

Process	Table	Field
<i>Credit check: time hold</i>	Pay Type Order Header SKU	Order header hold reason Order header/order hold reason system hold reason On-hold quantity
<i>Credit check: check fraud</i>	Pay Type Order Header SKU	Order header hold reason Order header/order hold reason system hold reason On-hold quantity
<i>Credit check: check interface hold</i>	Pay Type Order Header	Order header hold reason Order header/order hold reason system hold reason
<i>Credit check: balance due exceeds the \$ amount</i>	Order Header SKU	Order header/order hold reason system hold reason On hold qty
<i>Credit check: pay types</i>	Order Header SKU	Order header/order hold reason system hold reason On-hold quantity
<i>Credit check: credit card fraud</i>	Pay Type Order Header SKU	Order header hold reason Order header/order hold reason system hold reason On-hold quantity
<i>Credit check: credit card authorization pending status</i>	Pay Type Order Header SKU	Order header hold reason Order header/order hold reason system hold reason On-hold quantity
<i>Credit check: outstanding balance due</i>	Pay Type Order Header SKU	Order header hold reason Order header/order hold reason system hold reason On hold quantity
Update the Flash Report	Order Control Summary	Dollars of orders entered to-date Orders entered to-date Orders entered month-to-date Dollars of orders entered month-to-date Orders entered year-to-date Dollars of orders entered year-to-date Orders open, reserved Dollars of orders open, reserved Orders held, reserved Dollars of orders held, reserved Total orders reserved/ unprinted
Update order header and order ship-to status to match status of detail lines if all lines canceled.	Order Header Order Ship To	Order header order status Order ship to order status

Process	Table	Field
Creates Order Orchestration request for each order line that is eligible, and submits request to Order Orchestration. .See Order Orchestration Integration for an overview.	Order Broker	All fields
Creates store fulfillment trigger record and supporting tables if any order lines are flagged for store fulfillment	Store Pickup Header Store Ship To Store Pickup Payment Store Pickup Detail Store Pickup Detail Message IL Outbound Trigger	All fields
Updates the customer sold to order history	Customer Sold To Ord Hist	On order \$ # Orders LTD \$ Orders LTD Last card number Last expiration date Last order date Last order amount Order type Pay type Source code
Updates the customer sold to item history	Order/Billing History	All fields
Updates the customer ship to order history	Customer Ship To Ord Hist	On order \$ # Orders LTD \$ Orders LTD Last card Number Last expiration date Last order date Last order amount Order type Pay type Source code
Updates the customer ship to item history	Order/Billing History	All fields
Updates the individual item history	Order/Billing History	All fields
Sends balance of updates to background processing job (O/P ASYNC)		

Managing Declined Authorizations

In this part: This part presents the functions available to cancel orders that are declined by an authorization service, and includes the following topic:

- [Working with Credit Card Cancellations \(WCCC\)](#) shows you how to cancel orders flagged for cancellation due to credit card decline.

Releasing Held Orders

Topics in this part: The following sections describe how to review and release held orders:

- [Introducing Order Hold Reason Codes](#) describes system-assigned hold reason codes and their application to orders, and presents the screens you work with to create user-assignable hold reason codes.
- [Working with Customer Fraud Tables \(WCFD\)](#) discusses the process of creating, changing, and deleting fraudulent customers based on customer name and address.
- [Working with Miscellaneous Frauds \(WMFF\)](#) discusses the process of creating, changing, and deleting fraudulent customers based on postal or zip code, credit card, and check.
- [Displaying Order Hold Information](#) presents the customer screens you can use to investigate customer detail on a held order, and the Order Inquiry function you can use to review order status.

Introducing Order Hold Reason Codes

Purpose: The system places orders on hold for a variety of reasons, most having to do with the credit checking process. Hold reason codes are defined in the Order Hold Reason Code table. See [Establishing Order Hold Reason Codes \(WOHR\)](#).

Overview: You must release all holds on an order before the order can continue to process through the system. For example, if a multiple pay type order that includes a credit card and a check is placed on hold for credit card and check fraud, you must correct both conditions to release the order.

It is important to understand the various hold conditions and system hold codes to evaluate and release held orders.

In this topic:

- [Understanding System-Assigned Order Hold Reason Codes](#)
 - [Header-Level \(System\) Holds](#)
 - [Ship-to Holds](#)
 - [Pay Type Holds](#)
- [Summarizing System Hold Reason Codes](#)

Important:

You need to verify that each of these system-assigned codes exist in the Order Hold Reason Code table. Although the system assigns these codes to orders it places on hold, you will not be able to release the orders if the system does not find the appropriate code defined in the Order Hold Reason Code table. See [Establishing Order Hold Reason Codes \(WOHR\)](#).

For more information:

- Pay types: [Working with Pay Types \(WPAY\)](#)

- System control values: [Setting Up Order Entry Values](#)
- Customer tables: [Creating and Updating Customers](#)
- Authorization services: [Work with Authorization Services \(WASV\)](#)
- Miscellaneous frauds: [Working with Miscellaneous Frauds \(WMFF\)](#)

Understanding System-Assigned Order Hold Reason Codes

Purpose: The system assigns most order hold reason codes as part of its Credit Checking function. The credit checking program executes automatically whenever you accept a new order (by selecting *Accept* or *Accept/Add Rcpt*) during Order Entry, or when you accept changes to an existing order (by selecting *Accept* or *Accept/Add Rcpt*) during Order Maintenance.

Quotes: The system does not perform the credit check process until you convert a quote to an order; see [Entering Pre-Order Quotes](#) and [Converting Quotes to Orders](#).

Assigning an order hold reason to an order: The system assigns order hold reason codes based on conditions that exist at the order header level and with certain pay types. You must establish fraud and hold criteria in the System Control table, Customer and Miscellaneous Fraud tables, Customer tables, and the Pay Type table.

You cannot modify or delete hold reason codes that the system assigns, although you can prevent their use in some cases by *unselecting* the [Fraud Checking \(A68\)](#) system control value.

Each hold updates the order header table status to *H* (Hold). The system checks for hold conditions and assigns holds at three levels:

- Header (or system) level
- Ship To level
- Pay type level

An order can be on hold at all three levels at the same time, or just on header hold. There will always be a header hold when there is a Ship To hold or a Pay Type hold.

The system looks for, and assigns, hold codes in the following order:

- Sold To customer
- Bill To customer, when the system does not place an order on Sold To customer hold
- Ship To customer
- Dollar amount, when the system does not place an order on Sold To or Bill To customer hold
- Pay types, regardless of header and Ship To holds already placed on the order

E-commerce cancel requests: You can use the [Hold Reason for Failed E-Commerce Maintenance Transactions \(H11\)](#) to hold an order if the customer attempts to cancel an order from the web storefront, and the attempt fails. For example, the system does not permit cancellation of an order through the e-commerce interface if the order is in use, or if there are pick slips printed for any items on the order.

Header-Level (System) Holds

Orders go on header-level holds for reasons at the Sold To level, Bill To level, dollar level, or if there is only a Ship To or pay type hold. When any of the hold codes described below apply, the system updates the Order Header table with the system hold reason code.

Hold Code	Assigned When:
AR (Declined Credit Card Reauthorization)	Assigned when the REAUTH periodic function attempts to reauthorize an expired authorization, and the reauthorization is declined. See Reauthorization and Under Review Hold Scenarios for Orders Fulfilled through Order Orchestration for more information. Note: This hold reason is created automatically through the 19.4 update. If the AR hold reason already existed, it is overwritten.
AT (Declined Credit Card Authorization)	The credit card the customer used for the order has been declined from authorization. The specific reason for the decline is identified by a code you define in the Authorization Service table.
AU (Broker Order Under Review)	Assigned when a status inquiry response message from Order Orchestration indicates that the Under Review flag is selected for the retail pickup or delivery order. These status inquiry requests are generated through pick slip generation and through the BROKER integration layer process. Also applied when the order is created through the fulfillments response message. See Order Orchestration Integration for background on how orders are flagged as Under Review. Also, see Reauthorization and Under Review Hold Scenarios for Orders Fulfilled through Order Orchestration for a discussion. Note: This hold reason is created automatically through the 19.4 update. If the AU hold reason already existed, it is overwritten.
AV (Address Verification)	The authorization sends a code that has not been defined as a vendor response code through Defining Authorization Services (WASV) .
BD (Balance Due)	The order is paid with a prepaid pay type (pay category Cash/Check) and the amount of the short payment is greater than the dollar amount or percentage specified in the Pay Type table. If both a dollar amount and a percentage are defined for the pay type, then the system checks the dollar limit first to determine whether to apply the hold reason. The system writes balance due amounts to the refund/credit subsystem for manual review and write-off. If you apply sufficient additional payment to the order, the system releases the order from a balance due hold automatically.
BF (Bill To Fraud)	• you enter <i>Fraud</i> in the Hold/bypass/fraud field of the Bill To Customer table for the customer or • the system finds a match on the standard match code or one of three fraud match codes in the Customer Fraud table.
BU (Bill To Unconditional Hold)	You enter <i>Hold</i> in the Hold/bypass/fraud field in the Bill To Customer table for the customer.
CB (Customer Rejected Deposit/Credit Card)	The system finds a match to the order's credit card on a rejected deposit associated with a deferred or installment payment plan. When an order is placed on <i>CB</i> hold, the system writes an order transaction history message indicating the order has been placed on hold.
CI (Check Interface Hold)	Not currently implemented.

Hold Code	Assigned When:
DH (Dollar Hold)	- you defined a maximum order total in the Maximum Order Amount (A92) system control value, and - the order total exceeds this value, and - the system detects no hold conditions at the Sold To, Bill To, or Ship To level - the order is not an e-commerce order that exceeds the Maximum Order Amount for E-Commerce Orders (H54)
EH (E-Commerce Dollar Hold)	- you defined a maximum order total in the Maximum Order Amount for E-Commerce Orders (H54) system control value, and - you also defined a maximum order total in the Maximum Order Amount (A92) system control value, and - the e-commerce (order API) order total exceeds the Maximum Order Amount for E-Commerce Orders (H54), and - the system detects no hold conditions at the Sold To, Bill To, or Ship To level Order Administration identifies an e-commerce order if the order type matches the E-Commerce Order Type (G42) system control value or if the Internet order flag in the Order Header table is set to <i>I</i>. The order API sets this flag to <i>I</i> when it creates an order.
EO (Email Fraud Hold)	The bill-to customer or sold-to customer has an Email address that matches an email address in the Miscellaneous Fraud table, or the order-level email matches; see Working with Miscellaneous Frauds (WMFF).
FC (Fraud Cancellation Hold)	The CyberSource Decision Manager Update Process retrieved order information from Decision Manager for orders that were marked as review during the CyberSource Decision Manager Update Process and the new decision assigned to the order is REJECT, indicating a user in Decision Manager reviewed the order and rejected the order. In this situation, Order Administration places the order on <i>FC</i> Fraud Cancellation hold if the entire order cannot be canceled.
FS (Fraud Scoring Hold)	The online authorization transaction sent to Cybersource for the credit card payment on the order was evaluated by CyberSource Decision Manager Fraud Scoring, and based on the order profile, requires review for possible fraud.
GC (Gift Card Hold)	The order contains a stored value card item and a stored value card payment method. The system evaluates this hold only if the Use Gift Card Fraud Checking (L72) system control value is selected.
IP	The ip_addr in the <i>Inbound Order XML Message (CWORDERIN)</i> (when creating an order through the generic order API) matched an IP address in the Miscellaneous Fraud table; see Working with Miscellaneous Frauds (WMFF). For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
PT (Pay Type)	The order is on pay type hold and no other hold exists. The system places the order pay type on hold, but displays <i>PT</i> at the header level to let you know that you need to investigate and release the pay type record.

Hold Code	Assigned When:
RL (Oracle Retail Customer Engagement Communication Failure)	During the order accept process, Order Administration could not connect with Oracle Retail Customer Engagement to redeem the award amount applied to an order. When an order is placed on <i>RL</i> hold, the system writes an order transaction history message indicating the award amount was not automatically redeemed so a user can log in to Oracle Retail Customer Engagement and manually redeem the award amount against the loyalty card: <code>SYSTEM UPDATE Loyalty Award Redemption Failed 99.99</code>, where 99.99 is the award amount applied to the order. See Applying and Redeeming Customer Engagement Awards during Order Processing for more information.
SB (Customer Rejected Deposit/Customer Fraud)	The system finds a match to the order's sold to customer on a rejected deposit associated with a deferred or installment payment plan. When an order is placed on <i>SB</i> hold, the system writes an order transaction history message indicating the order has been placed on hold.
SF (Sold To Fraud)	1. you enter <i>Fraud</i> in Hold/bypass/fraud field in the Sold To Customer table for the customer, or 2. the system finds a match on the standard match code or one of three fraud match codes in the Customer Fraud table; see Working with Customer Fraud Tables (WCFD). The system also sets a ship-to hold of <i>HS</i>.
SH (Ship To Hold)	The order is on Ship To hold only. The system places the Ship To record on hold, but displays <i>SH</i> at the header level to let you know that you need to investigate and release a Ship To record.
SM (Ship-to Mismatch)	The system places an order on <i>SM</i> Ship To Mismatch hold if the following conditions are met: • the order contains a <i>Credit Card</i> pay category payment method, and • the ship to address on the order is different from the sold to address, and • the order total is greater than the Maximum Order Amount for Fraud Checking (D24), and • the ship via priority for the ship via on the order header matches the Ship Via Priority for Ship To Mismatch (L71), and • the number of times shipped to the address is less than the # of Times Shipped to Same Address (D25) OR the number of days since the last shipment to the address is less than the # of Days Since Last Order (D26). See the Maximum Order Amount for Fraud Checking (D24) for examples.
SU (Sold To Unconditional)	You enter <i>Hold</i> in the Hold/bypass/fraud in the Sold To Customer table for the customer.
UB (Unreferenced Bill To)	You create a new bill-to customer through Order Entry. The system assigns this hold reason only if the Allow Order for New Bill-to Without Order Hold (D84) system control value is <i>unselected</i>. Unlike the holds described below, this header level hold occurs prior to credit checking.

Hold Code	Assigned When:
VD (Void Pick)	A pick slip for the order is voided through the Void/Reprint pick function by selecting <i>Void All/Hold Order</i> (see Void All Pick Slips and Hold Order in <i>Reprinting and Voiding Pick Slips (WVRP or WSVF)</i>). You must release the order through <i>Selecting Held Orders</i>, not through Order Maintenance. See Manage Held Orders in Modern View online help. Although this type of hold is not applied during the credit checking process, it has been described here because it is a system-level hold.
WO (Warranty Order Hold)	The cost for all of the warranty items on an order exceeds the amount defined in the Maximum Warranty Order Amount (F97) system control value. Since warranty items are added to an order at no charge, the system uses the cost defined for the item to determine the dollar amount of a warranty item on an order. If the cost was overridden on the order detail line, the system uses the cost override.
WC (Warranty Customer Hold)	The Life to date warranty dollars field on the Work with Customer Warranty Information Screen for the sold to customer exceeds the amount defined in the Maximum LTD Warranty Amount for Customer (F98) system control value. The system uses this calculation to update the Life to date warranty dollars field: warranty shipped amount - warranty returned amount = life to date warranty dollars amount.
ZB (Bill To Zip Fraud)	The postal code on the Bill To address matches a postal code in the Miscellaneous Fraud table.
ZS (Sold To Zip Code Fraud):	The postal code on the Sold To address matches a postal code in the Miscellaneous Fraud table.

Ship-to Holds

The system continues searching for hold conditions at the Ship To level. When a hold occurs at the Ship To level, the system updates the Ship To order reason and status with one of the codes discussed below. The following code applies when there is only a Sold To customer on the order.

Hold code	Assigned When:
ES	The shipping address on the order has an email address that matches an email address in the Miscellaneous Fraud table; the match can be a recipient, a permanent ship-to or an order ship-to. (Note: The system puts the order on hold only if the customer's primary email address matches the email address in the Miscellaneous Fraud table.) See Working with Miscellaneous Frauds (WMFF), Creating and Updating Ship-to Customers (WCST), Adding a Recipient Order in Order Entry, and Assigning an Order Shipping Address.
HF (Ship To Fraud)	Applies to a permanent Ship To on an order when the system locates a match on the standard match code or on a fraud match code in the Fraud table; see Working with Customer Fraud Tables (WCFD).
HS (Ship To/Sold To Fraud)	The ship-to address on the order matches an address in the Fraud table; see Working with Customer Fraud Tables (WCFD). This is a secondary hold applied if a sold-to fraud (SF) occurs. Also, the system assigns this hold reason code if you have not set up all four of the match code types through Setting Up Match Codes (MMCH).

Hold code	Assigned When:
ZH (Ship To Zip Fraud)	The postal code on the Ship To address matches a postal code in the Miscellaneous Fraud table; see <i>Working with Miscellaneous Frauds (WMFF)</i> .

**Note:**

The HF or ZH hold codes may apply when the Ship To and Sold To customers differ (that is, when the order includes a permanent or one-time shipping address).

Pay Type Holds

The system checks for pay type holds, regardless of any other order holds. The payment methods used on the order control how the system performs the credit check routines.

Prepaid orders:(Cash/Check) Prepaid orders are orders paid by cash, check or money order. The following holds may occur:

Hold code	Assigned When:
TM (Time hold)	You specify a time period in the Pay Type table. For example, you may decide to hold a customer's check for a specified number of days, so that you are sure that the check clears. The hold remains in effect until the time period elapses or until you release the order from hold manually through the Release Held Orders program; see <i>Selecting Held Orders</i>. See Manage Held Orders in Modern View online help. The system places all recipient orders on time hold if the order uses multiple payment methods or has multiple recipients.
KF (Check fraud)	The system checks orders against the Miscellaneous Fraud table, and the micra number (routing number, located on the bottom of the check) is in the Miscellaneous Fraud table; see <i>Working with Miscellaneous Frauds (WMFF)</i> .

Credit card orders: The system checks orders paid by credit card for the following holds:

Hold code	Assigned When:
CF (Credit Card Fraud)	The system finds the credit card number in the Miscellaneous Fraud table; see <i>Working with Miscellaneous Frauds (WMFF)</i> .

Hold code	Assigned When:
CW (Waiting for Credit Card Authorization)	Orders are waiting for authorization from a credit card service bureau. If the only hold on the order is CW, then the order does not actually go on hold. Instead, the order continues its normal routing process. The order displays CW as the pay type status in standard Order Inquiry, but the order is open. The system authorizes the amount to be shipped during Pick Slip Generation. If the service bureau declines the order at this point, then the order may go on hold, depending on the reason for the decline. When the service bureau declines the credit card charge, the system checks the Vendor Authorization table to determine if a hold code exists for the decline reason. If the Hold reason field in the Vendor Response record is blank, the system will not place the order on a declined authorization hold. Instead, it assigns AV as a hold reason at the header level of the order to remind you that the order is waiting to be resubmitted for authorization. If the Vendor Response record includes a hold reason code for the declined reason, then the system places the pay type on hold using the hold reason code in the Vendor Response record, and assigns a code of AT to the order header. <i>Example:</i> The service bureau gives you the following reasons for declining authorization: 01 = Card stolen 02 = Unable to reach bank You create a record for each reason in the Vendor Authorization table, entering XY in the Hold reason field as a code for “card stolen,” and leaving the Hold reason field blank for “unable to reach bank.” <i>Scenario 1:</i> The service bureau declines a credit card charge, returning 01 (card stolen) as the reason for the decline. The system: 1. Checks the Vendor Response record for response code 01 and finds XY in the Hold reason field. 2. Places the order on hold, assigning AT (Authorization declined) to the order header. 3. Places the pay type on hold, assigning XY to the pay type. <i>Scenario 2:</i> The bank's phone line is busy when the service bureau tries to authorize the credit card charge. The service bureau returns code 02 (unable to reach bank) as the reason. The system: 1. Checks the Vendor Authorization table for response reason code 02 and finds no code in the Hold reason field. 2. Leaves CW at the pay type level, indicating that the order will be automatically resubmitted for authorization.

Hold code	Assigned When:
PV (Pay Plan Velocity Hold)	A credit card has been used too many times within a specified period for an order containing a deferred or installment payment plan. The system determines when to place an order on <i>PV</i> pay type hold based on the values defined in the: <i>Number of Times Flexible Payment Option is Used (F52)</i> system control value. This system control value defines the number of times a credit card can be used before an order containing a deferred or installment payment plan is placed on <i>PV</i> hold. Example: If you enter 2 in the <i>Number of Times Flexible Payment Option is Used (F52)</i> system control value, the system will place an order on <i>PV</i> hold if the credit card has been used on more than 2 orders containing a deferred or installment payment plan. <i>Number of Days Flexible Payment Option is Used (F53)</i> system control value. This system control value defines the number of days this credit card can be used before an order is placed on hold. The system only determines the number of days a credit card can be used before its next use on an order containing a deferred or installment payment plan if the credit card exceeded the number of days defined in the <i>Number of Times Flexible Payment Option is Used (F52)</i> system control value. Example: If you entered 2 in the <i>Number of Times Flexible Payment Option is Used (F52)</i> system control value and the credit card was used on more than 2 orders containing a deferred or installment payment plan, the system would then determine the last time the credit card was used. If you entered 5 in the <i>Number of Days Flexible Payment Option is Used (F53)</i> system control value, the system would place the order on <i>PV</i> hold if the credit card was used on more than 2 orders containing a deferred or installment payment plan and the credit card was used less than 5 days ago.
P\$ (Pay plan Dollar Threshold)	The total dollar amount and invoice amount outstanding for a sold to customer on orders containing a deferred or installment payment plan exceeds the dollar amount defined in the <i>Dollar Threshold for Sold To Customer Orders with Flexible Payments (F54)</i> system control value. The system uses this calculation to determine the total dollar amount outstanding for a sold to customer on orders containing a deferred or installment payment plan: $\text{balance open amount} + \text{open invoice amount} = \text{total outstanding dollar amount}$ Example: Dollar threshold amount = 100.00 balance open amount = 75.00 open invoice amount = 50.00 75.00 + 50.00 = 125.00 (total outstanding dollar amount) Since the total outstanding dollar amount is greater than the dollar threshold amount defined in the <i>Dollar Threshold for Sold To Customer Orders with Flexible Payments (F54)</i> system control value, the system places the order on <i>P\$</i> hold.

User-defined holds: Most of the hold reason codes the system assigns revolve around issues of suspicious credit. However, you can also create your own hold reason codes for other business reasons, which are assigned as user holds. See [Establishing Order Hold Reason](#)

[Codes \(WOHR\)](#). You would not normally assign system-defined holds manually to orders in order to prevent confusion.

Summarizing System Hold Reason Codes

Hold Code	Description	See	SCV(s)	Hold Level
AR	Declined Credit Card Reauthorization	Reauthorization and Under Review Hold Scenarios for Orders Fulfilled through Order Orchestration		Order Header
AT	Declined Credit Card			Order Header
AU	Broker Order Under Review	Reauthorization and Under Review Hold Scenarios for Orders Fulfilled through Order Orchestration		Order Header
BD	Balance Due Exceeds \$ Amount	<i>Working with Pay Types (WPAY).</i>		Order Header
BF	Bill To Fraud	<i>Creating and Updating Bill-to Customers (WCBT)</i>	Fraud Checking (A68)	Order Header
BU	Bill To Unconditional	<i>Creating and Updating Bill-to Customers (WCBT)</i>		Order Header
CB	Customer Rejected Deposit/Credit Card			Pay Type
CF	Credit Card Fraud	<i>Working with Miscellaneous Frauds (WMFF)</i>		Pay Type
CI	Check Interface Hold		Not currently implemented.	Order Header
CW	Credit Authorization			Pay Type
Note: CW does not stop the order from processing; hold assigned during Pick Slip Generation				

Hold Code	Description	See	SCV(s)	Hold Level
DH	Dollar Hold		Maximum Order Amount (A92)	Order Header
EB	Bill-to Email Address	<i>Working with Miscellaneous Frauds (WMFF) and Creating and Updating Bill-to Customers (WCBT)</i>	Fraud Checking (A68)	Order Header
EC	Sold-to Customer Email Address	<i>Working with Customer Email Addresses and Working with Miscellaneous Frauds (WMFF)</i>	Fraud Checking (A68)	Order Header
EH	E-Commerce Dollar Hold		Maximum Order Amount for E-Commerce Orders (H54)	Order Header
EO	Order Email Address	<i>Working with an Order-Level Email Address and Working with Miscellaneous Frauds (WMFF)</i>	Fraud Checking (A68)	Order Header
ES	Ship-to Email Address	<i>Creating and Updating Ship-to Customers (WCST), Assigning an Order Shipping Address and Working with Miscellaneous Frauds (WMFF)</i>	Fraud Checking (A68)	Order Ship To
FC	Fraud Cancellation Hold	CyberSource Decision Manager Review Process		Order Header
FS	Fraud Scoring Hold	CyberSource Decision Manager Review Process		Order Header
GC	Gift Card Hold		Use Gift Card Fraud Checking (L72)	Order Header
HF	Ship To Fraud	<i>Working with Customer Fraud Tables (WCFD)</i>	Fraud Checking (A68)	Order Ship To (permanent Ship To only)
HS	Sold To/Ship To Fraud	<i>Working with Customer Fraud Tables (WCFD) or Setting Up Match Codes (MMCH)</i>		Order Ship To
HS	Sold-to/Ship Fraud	<i>Working with Customer Fraud Tables (WCFD)</i>		Order Ship To
IP	IP Address	<i>Working with Customer Fraud Tables (WCFD)</i>		Order Header
KF	Check Fraud	<i>Working with Miscellaneous Frauds (WMFF)</i>		Pay Type

Hold Code	Description	See	SCV(s)	Hold Level
OB	Outstanding Balance Due	<i>Creating and Updating Bill-to Customers (WCBT)</i>		Pay Type
PT	Pay Type			Order Header
PV	Pay Plan Velocity Hold		<i>Number of Times Flexible Payment Option is Used (F52); Number of Days Flexible Payment Option is Used (F53)</i>	Pay Type
P\$	Pay Plan Dollar Threshold		<i>Dollar Threshold for Sold To Customer Orders with Flexible Payments (F54)</i>	Pay Type
RL	Oracle Retail Customer Engagement Communication Failure	<i>Applying and Redeeming Customer Engagement Awards during Order Processing</i>		Order Header
SB	Customer Rejected Deposit/ Customer			Order Sold To
SF	Sold To Fraud	<i>Working with Customer Fraud Tables (WCFD)</i>	<i>Fraud Checking (A68)?</i>	Order Header
SH	Ship To Only			Order Header
SM	Ship To Mismatch		<i>Maximum Order Amount for Fraud Checking (D24) # of Times Shipped to Same Address (D25) # of Days Since Last Order (D26)</i>	Order Header
SU	Sold To Unconditional	<i>Creating and Updating Sold-to Customers (WCST)</i>		Order Header
TM	Time Hold	<i>Working with Pay Types (WPAY).</i>		Pay Type

Hold Code	Description	See	SCV(s)	Hold Level
UB	Unreferenced Bill To		Create/Assign Bill To Customers in Order Entry (A76) Allow Order for New Bill-to Without Order Hold (D84)	Order Header
Note: UB holds occur when adding new Bill To customer account through Order Entry				
VD	Voided Pick	Void All Pick Slips and Hold Order		Order Header
WC	Warranty Customer Hold		Maximum LTD Warranty Amount for Customer (F98)	Order Header
WO	Warranty Order Hold		Maximum Warranty Order Amount (F97)	Order Header
ZB	Bill To Zip Code Fraud	Working with Miscellaneous Frauds (WMFF)	Fraud Checking (A68)	Order Header
ZH	Ship To Zip Code Fraud	Working with Miscellaneous Frauds (WMFF)	Fraud Checking (A68)?	Order Ship To
ZS	Sold To Zip Code Fraud	Working with Miscellaneous Frauds (WMFF)		Order Header

Displaying Order Hold Information

Purpose: You might want to display held order information at a summary or detail level when determining whether to release orders from hold. You can view order status and distinguish orders that are on hold versus orders that are closed, canceled, or in some other state. As part of your prerelease management process, you can identify and evaluate specific system and user holds, as well as whether payment methods and ship-to records are on hold.

In this topic:

- [Held Order Reasons Pop-Up Window \(Displaying Hold Reason Codes\)](#)
- [First Display Customer Screen](#)
- [Second Display Customer Screen](#)
- [Using the Order Inquiry Header Screen to Review Held Orders](#)

For more information: See the [Work with Order Recipients Screen](#).

Held Order Reasons Pop-Up Window (Displaying Hold Reason Codes)

Purpose: You might find it useful to review the primary system hold and user hold codes assigned to an order before you release it, or to determine whether you need to take a closer look at the order.

How to display this window: Select *Hold reasons* for a held order at the [Release Held Orders Screen \(Working with Releases\)](#).

About this window: The information on this window includes:

- Order number
- Customer name
- System hold reason code and description, if applicable
- User hold reason code and description, if applicable
- Payments held condition and description
- Recipients held condition and description, if applicable

See [Release Held Order Scan Screen](#) and [Release Held Orders Screen \(Working with Releases\)](#) for field descriptions.

Hold hierarchy: The system hold reason code that appears on this screen is the reason code at the highest level. See [Understanding System-Assigned Order Hold Reason Codes](#) for a description of the sequence the system follows when assigning system holds. An order may contain additional holds that are not visible on this screen until you release the order from the displayed hold. You can, however, identify whether the order has a payment method or ship-to holds.

First Display Customer Screen

Purpose: Use the Display Customer screens to review customer information for held orders.

How to display this screen: At the [Release Held Orders Screen \(Working with Releases\)](#), select *Cust Info* for an order.

For more information: See [Creating and Updating Sold-to Customers \(WCST\)](#) for descriptions of the fields and options on this screen.

Second Display Customer Screen

Purpose: This screen displays additional information on the sold-to customer.

How to display this screen: Select *OK* at the [First Display Customer Screen](#).

For more information: See [Creating and Updating Sold-to Customers \(WCST\)](#) for descriptions of the fields and options on this screen.

Using the Order Inquiry Header Screen to Review Held Orders

Purpose: Use the [Order Inquiry Header Screen](#) when you want to see the order's summary information and the system header reason code, or ship-to reason code, affecting an order.

This screen displays the ship-to hold reason, when one exists, and displays the header hold reason when no ship-to hold exists. When you identify a ship-to hold reason, you then need to determine whether more than one ship-to address exists for the order. Check the Recip field to determine this information. If there is more than one ship-to, you can identify the held ship-to records by viewing the [Work with Order Recipients Screen](#).

Whenever a hold applies at either the header or ship-to level, the entire order is held as a result.

How to display this screen: At the [Release Held Orders Screen \(Working with Releases\)](#), select *Order Inquiry* for an order.

The [Order Inquiry Header Screen](#) displays information relating to both sold-to and ship-to customers. Fields on this screen reflect information created through Order Entry.

Performing the Release

Purpose: You can release all holds associated with the order, or release only pay type or ship-to holds. This topic presents the screens you work with to release:

- Ship-to holds
- Pay type holds
- System-level holds



Note:

Releasing a system level hold releases ship-to and pay type holds automatically.

Release authority: You can set authority to release held orders for users or user classes. Users can be restricted from releasing orders with particular order hold reasons, or all hold reason codes. This authority controls header-level hold reasons only; you cannot use it to control access to pay type or recipient hold release. See [Establishing Order Hold Reason Codes \(WOHR\)](#).

Releasing through a web service request: You can use the *Order Maintenance API* to release a user hold.

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

If the order has a system hold reason of AR or AU: See [Reauthorization and Under Review Hold Scenarios for Orders Fulfilled through Order Orchestration](#) for a discussion of how these orders can be released from hold.

In this topic:

- [Recap of Screen Relationships](#)
- [Release Order Recipients Screen](#)
- [Work with Order Recipients Screen](#)
- [Releasing Recipient \(Ship-to\) Holds](#)
- [Release Recipient Hold Reason Pop-Up Window](#)
- [Release All Recipients Prompt Pop-Up Window](#)
- [Release Held Order Payment Methods Screen](#)
- [Releasing Order Payment Methods](#)
- [Release Order Payment Method Window](#)
- [Release All Payments Window](#)

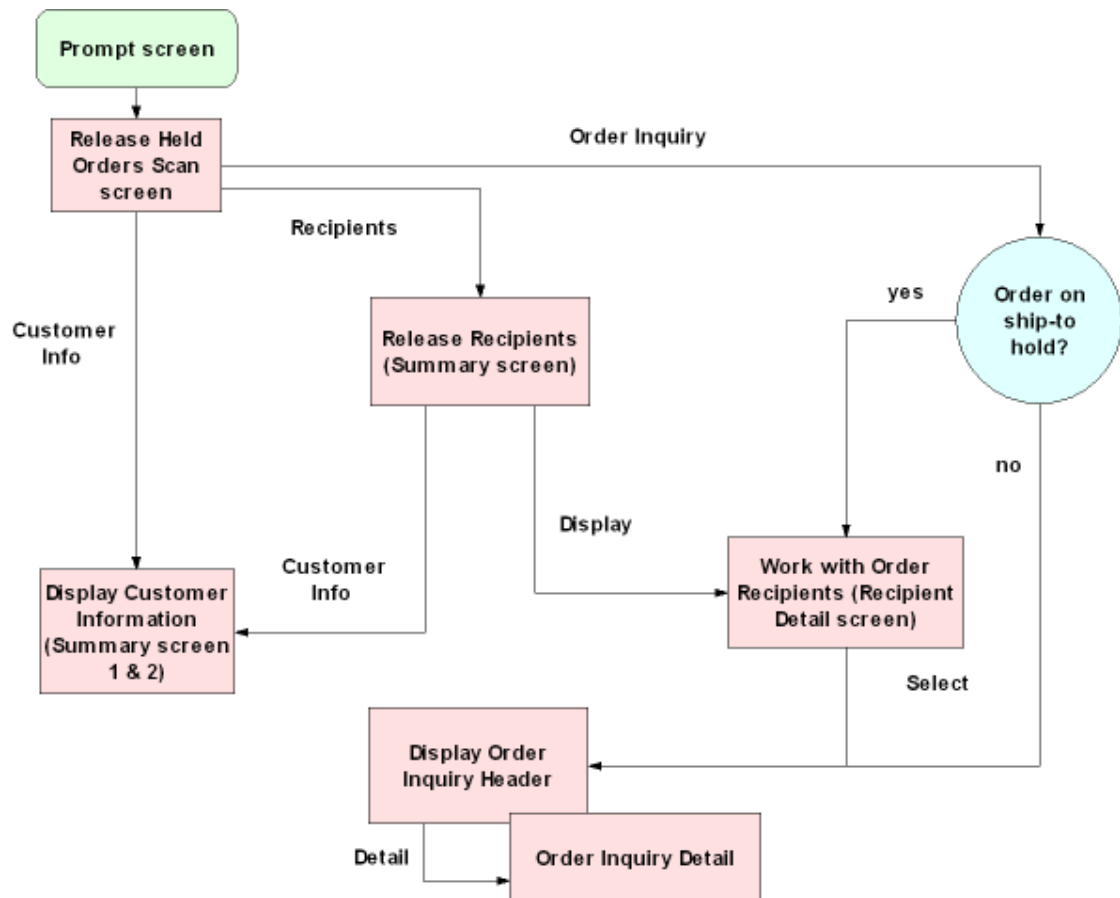
- [Releasing Held Orders by Order Number](#)
- [Release Reason Prompt Pop-Up Window](#)

Order maintenance allows you to work with payment information or clear a header-level hold, using the [Enter Payment Methods Screen in Order Maintenance](#) or the [Work with Order Screen in Order Maintenance](#).

Recap of Screen Relationships

Purpose: From the [Release Held Orders Screen \(Working with Releases\)](#), you can advance to summary and detail screens that will enable you to review, evaluate, and release held orders.

Diagram: This diagram shows you the routes you take from one screen to another when you are working from the [Release Held Orders Screen \(Working with Releases\)](#).



Release Order Recipients Screen

Purpose: Use this screen to release holds for ship-to customers. From the [Release Held Orders Screen \(Working with Releases\)](#), you can review and release held recipients from ship-to hold. You can identify held recipient records by the Yes in the order's Rcp field on the Release Held Orders screen, or by viewing the [Held Order Reasons Pop-Up Window \(Displaying Hold Reason Codes\)](#). Releasing held recipients releases holds that apply to ship-to customers only. See [Performing the Release](#) and [Recap of Screen Relationships](#).

**Note:**

You cannot set release authority for recipient-level holds, only for order-level holds. See [Establishing Order Hold Reason Codes \(WOHR\)](#).

How to display this screen: Select *Recipients* for an order at the [Release Held Orders Screen \(Working with Releases\)](#).

Field	Description
Ship via	The carrier selected for the order. Alphanumeric, 15 positions; display-only.
Recipient (Ship-to number)	The system assigns a ship-to number sequentially to each shipping address on an order. The ship-to number appears as a suffix to the order number. Numeric, 3 positions; display-only.
Recipient name (Unlabeled field to the right of the ship-to number)	The name of the recipient. Alphanumeric, 41 positions; display-only.
Hold	Represents the type of hold assigned to the ship-to record. Only system holds display on this screen. Alphanumeric, 2 positions; optional.

Screen Option	Procedure
Display order recipients	Select <i>Display</i> for a recipient to advance to the Work with Order Recipients Screen .
Release held order recipients	Select <i>Release</i> for a recipient to display a pop-up window providing the option to release the record. See Releasing Recipient (Ship-to) Holds .
Display customer information	Select <i>Cust Info</i> for a recipient to advance to the First Display Customer Screen .
Release all held order recipients	Select <i>Release All</i> to release all recipients from hold. See Releasing Recipient (Ship-to) Holds .

Work with Order Recipients Screen

Purpose: Use this screen to review the customer and order detail screens for the recipients on an order.

How to display this screen: At the [Release Order Recipients Screen](#), select *Display* for the recipient(s) you want. If there is more than one recipient to the order, you advance to the Work with Order Recipients screen. If there is only one recipient for the order on the screen, you advance directly to the [Order Inquiry Header Screen](#) or the [Order Inquiry Detail Screen](#), depending on the setting of the [Default Version for Order Inquiry \(C34\)](#) system control value.

Field	Description
Order #	The number the system assigned to the held order. Numeric, 8 positions; display-only.

Field	Description
Sold to	The customer number the system assigned to the customer who placed the order. Numeric, 9 positions; display-only.
Customer name (Unlabeled field to the right of the sold-to number)	The name of the customer who placed the order. Alphanumeric, 25 positions; display-only.
Rcp # (Recipient number)	The number the system assigns sequentially to each ship-to address on an order. Numeric, 3 positions; display-only
Customer#	The number the system assigned to the ship-to customer. Numeric, 9 positions; display-only.
Name	The customer's name and address. Alphanumeric, 3 lines; display-only.
Sts (Status)	The status of the order. This field is not implemented on this screen. Alphanumeric, 1 position.
Merch amt (Merchandise amount)	The dollar value of the merchandise for the recipient. Numeric, 20 positions with a 2-place decimal; display-only.

Screen Option	Procedure
Select a recipient record for review	Select a recipient to advance to Order Inquiry.
Display customer address and information	Select <i>Display</i> for a recipient to advance to the First Display Customer Screen .

Releasing Recipient (Ship-to) Holds

Purpose: From the initial [Release Order Recipients Screen](#) you can release holds associated with an specific recipient, or release all held recipients for the order.



Note:

You cannot set release authority for recipient-level holds, only for order-level holds. See [Establishing Order Hold Reason Codes \(WOHR\)](#).

Pick slip preparation: When you release an order from hold, the system determines whether the order is eligible for pick slip preparation; see [Preparing Orders for Pick Slip Generation](#).

Release Recipient Hold Reason Pop-Up Window

At the [Release Order Recipients Screen](#), select *Release* for a ship-to recipient you want to release from all ship-to holds to display the Release Recipient Hold Reason pop-up window. You can use this window to change the release flag from *unselected* to *selected*.

Release All Recipients Prompt Pop-Up Window

At the [Release Order Recipients Screen](#), select *Release All* to release all held ship-tos for the order and display this window.

Release Held Order Payment Methods Screen

Purpose: Use this screen to display payment method (pay type) information and to release orders from payment method holds.



Note:

You cannot set release authority for payment method holds, only for order-level holds. See [Establishing Order Hold Reason Codes \(WOHR\)](#).

How to display this screen: At the [Release Held Orders Screen \(Working with Releases\)](#), select *Pay Methods* for an order.

Field	Description
Order	A unique number the system assigns to an order. Numeric, 8 positions; display-only.
Order date	Unlabeled field to the right of the order number. The date the order was created. Numeric, 6 positions (in user date format); display-only.
Pay type	A user-defined code that represents the pay type on the order. Pay type codes must represent the following: • Cash/check • Credit card Pay types are created in and validated against the Pay Type table. See Working with Pay Types (WPAY) . Numeric, 2 positions; optional.
Hold reason	The reason the user placed the record on hold. See Establishing Order Hold Reason Codes (WOHR) .
Balance open	Alphanumeric, 2 positions; optional. The unbilled portion of the order that must be changed to this payment method. Numeric, 20 positions with a 2-place decimal; optional.
Until date	The date when the order becomes eligible for release by the Release Orders on Time Hold Periodic Function. This date displays only for orders held because of a declined credit card authorization. The system calculates this date based on the number of days you specify for the vendor response code. See Defining Vendor Response Codes for more information on setting up authorization services. Numeric, 6 positions (in user date format); display-only, assigned by the system.



Note:

You cannot release the Awaiting Credit Card Auth (CW) hold.

Screen Option	Procedure
Display a payment method record	Select <i>Display</i> for a payment method to advance to the Display Order Payment Methods Screen .
Release a specific payment hold	Select <i>Release</i> for a payment method to display a Release Order Payment Method Window .
Release all payment holds on the order	Select <i>Release All</i> to display the Release All Payments Window .

Releasing Order Payment Methods

Purpose: From the [Release Held Order Payment Methods Screen](#), you can release an individual payment method from hold, or release all payment methods on the order.

Pick slip preparation: When you release an order from hold, the system determines whether the order is eligible for pick slip preparation; see [Preparing Orders for Pick Slip Generation](#).

Credit card pay types requiring authorization: When you release a credit card pay type from hold, if the pay type has an authorization service code defined and the credit card requires authorization, the system places the credit card pay type on *CW Waiting for Credit Card Authorization* hold. If the only hold on the order is CW, the order does not actually go on hold. Instead, the order continues its normal routing process. The order displays CW as the pay type status in standard Order Inquiry, but the order is open. The system authorizes the shipment amount during Pick Slip Generation. If the service bureau declines the order at this point, then the order may go on hold, depending on the reason for the decline.

Release Order Payment Method Window

Use this pop-up window to release a payment method from hold. At the [Release Held Order Payment Methods Screen](#), select *Release* for a payment method to display this pop-up window.

Enter Y in the Release field to confirm the release, or enter N to retain hold status.

Release All Payments Window

Use this pop-up window to release all payment methods on an order from hold. Select *Release All* at the [Release Held Order Payment Methods Screen](#).

You can also release payment method (pay type) holds through order maintenance. You must use the [Enter Payment Methods Screen in Order Maintenance](#) in order maintenance to release pay type holds if you need to apply money or change the pay type information.



Note:

You cannot set release authority for payment method holds, only for order-level holds. See [Establishing Order Hold Reason Codes \(WOHR\)](#).

Releasing Held Orders by Order Number

Purpose: From the [Release Held Orders Screen \(Working with Releases\)](#), you can perform a global or individual order release on any order listed.

Pick slip preparation: When you release an order from hold, the system determines whether the order is eligible for pick slip preparation; see [Preparing Orders for Pick Slip Generation](#).

If the order has a system hold reason of AR or AU: See [Reauthorization and Under Review Hold Scenarios for Orders Fulfilled through Order Orchestration](#) for a discussion of how these orders can be released from hold.

Release Reason Prompt Pop-Up Window

At the [Release Held Orders Screen \(Working with Releases\)](#), select *Release* for the order you want to release from hold. The Release field in this window defaults to *N* (do not release the order).

Select the Release field to confirm the release.

Release authority: If you do not have authority to release the order from hold, the screen displays an error message. See [Establishing Order Hold Reason Codes \(WOHR\)](#).



Note:

This action releases all holds for the order (payment and ship-to holds). You receive a warning message if you attempt to release an order that has payment or ship-to holds.

Managing Returns

In this part:

- [Introducing Return Authorizations \(WRTA\)](#) discusses the three stages of creating, receiving, and issuing credit for merchandise returns.
 - [Selecting Orders for Return \(WRTA\)](#) shows you how to use the Select Order for Return Authorization screen to select an order for return authorization through the Work with Return Authorizations menu option.
 - [Working with Return Authorizations: Standard Process](#) describes how to create or work with a return authorizations using the standard process, which involves creating, receiving, and crediting returns in separate steps.
 - [Working with Return Authorizations: Streamlined Process](#) describes how to create or work with return authorizations using the streamlined process, which involves automatically processing the return authorization as far as your authority extends.
 - [Receiving Returns \(WRAR\)](#) shows you how to receive returns into your warehouse using a separate menu option.
 - [Crediting Returns \(WRAC\)](#) shows you how to credit returns using a separate menu option.
 - [Processing Credits by Line of Business \(MCLB\)](#) describes how to process credits for a specific line of business and dollar amount.
 - [Work with Return Interface Errors \(WRIE\)](#) describes the screens you use to review or delete return records which went into error status when received from an outside return system.
 - [Inbound Return API](#) describes using the generic returns API (RETURNS_IN process) to create and process a return against an order detail line, based on XML messages from an external system.
- For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

Working with Return Authorizations: Standard Process

Purpose: Use the standard return authorizations process to create, receive, and credit return authorizations in separate steps. When you select an order for return authorization, you advance to the screens you use for the standard process if the [Use Streamlined Return Authorizations \(F44\)](#) system control value is *unselected*. In addition to using separate steps and screens to process the return, the standard process differs from the streamlined process in that:

- you must select each item on the order for return individually; there is no "select all"
- you cannot work with additional charges through this method
- you can change a return authorization without processing it further

When you use the standard process, the screen you first advance to after selecting an order varies, depending on whether you have already created a return authorization for the order.

Selecting an order: The process you use to select an order for return authorization processing is the same regardless of whether you use the standard or streamlined process. See [Selecting Orders for Return \(WRTA\)](#).

Return authorization download triggers: If the [Create Return Download Triggers \(K28\)](#) system control value is *selected*, the system creates a return authorization download (RAD) trigger when you create, change, or delete a return authorization line, based on the trigger rules defined for the Return Authorization Download (RETURN_OUT) integration layer job. The RETURN_OUT integration layer job monitors for return authorization download triggers and generates a *Return Authorization Outbound XML Message (CWReturnRAOut)* to send the return authorization information to a remote system.

Retail pickup or delivery orders: You can process a return against a retail pickup or delivery order; however, shipping the order deactivates the [Order Broker Payment Type \(K98\)](#) applied to these orders, so you would then need to enter a new payment method in order to process the related refund.



Note:

You cannot process an exchange against a retail pickup or delivery order.

The system does not send a status update to Order Orchestration when you process a return against a retail pickup or delivery order.

See [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for an overview.

Pick slip preparation: When you select an order for return authorization, the system removes any pick slip preparation from the order. When you accept or reject the return authorization, the system determines if the order qualifies for pick slip preparation and reapplies it to the order. If you add an exchange item to the order, the system performs pick slip preparation for the exchange item when you receive the return authorization. See [Preparing Orders for Pick Slip Generation](#).

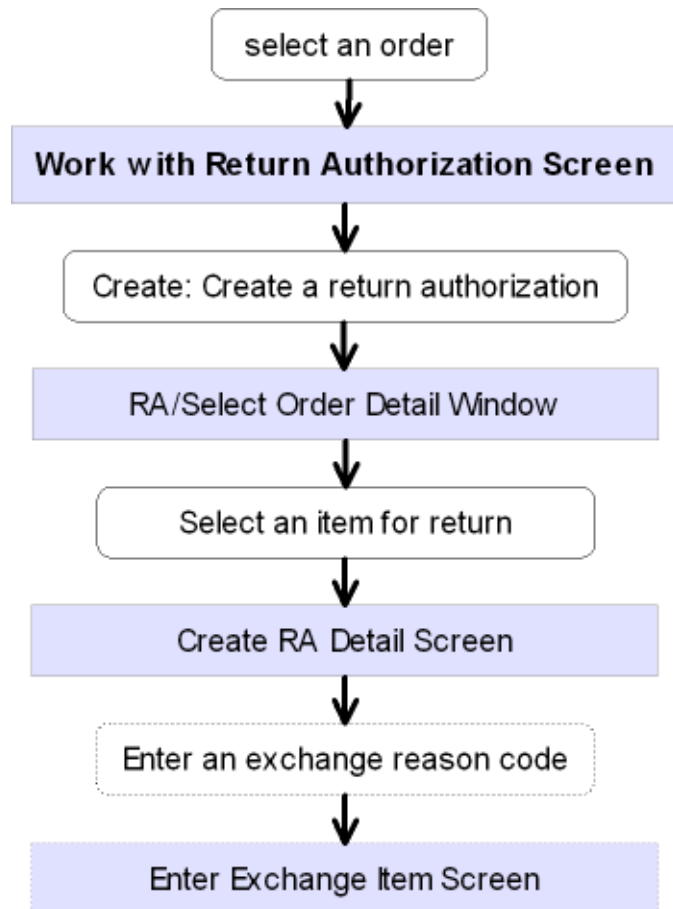
In this topic:

- [Screen Flow](#)
 - [Authority Level](#)
- [Work with Return Authorizations Screen](#)

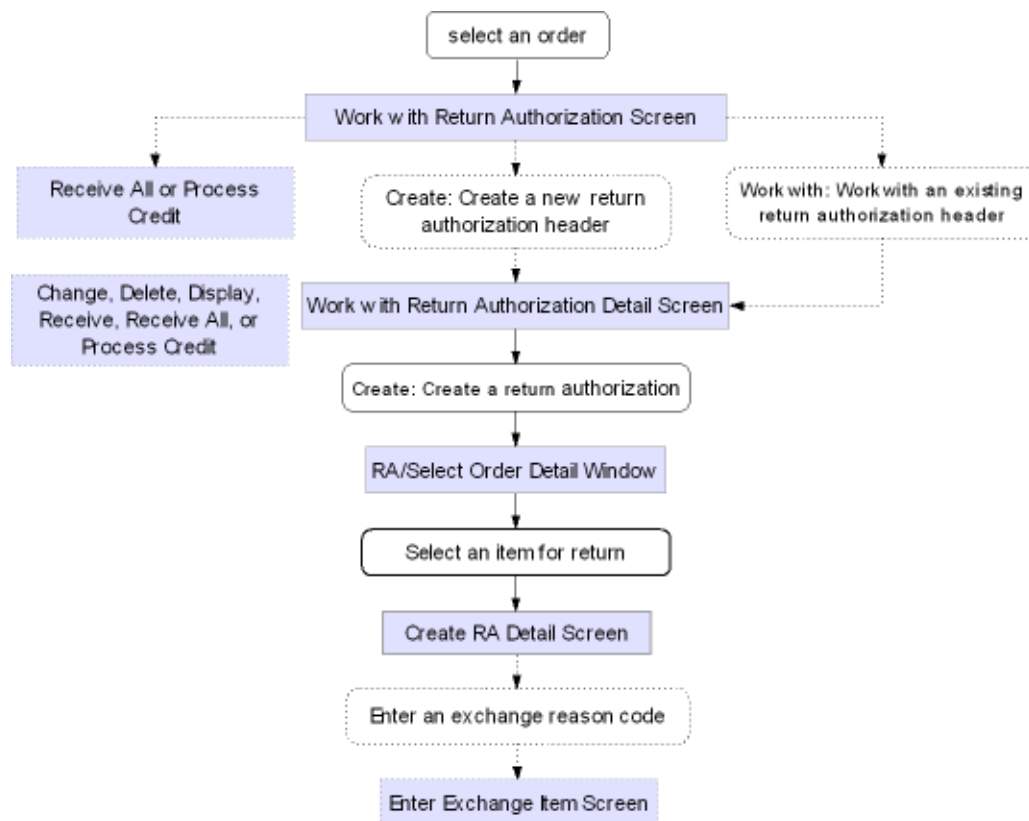
- *Work with Return Authorization Detail Screen*
- *R/A Select Order Detail Pop-Up Window*
- *Create RA Detail Screen*
- *Enter Exchange Item Screen*
- *Create RA Detail Screen (Processing Misships)*
- *Receiving All Returns*
 - *Receive All/Header Screen*
 - *Receive All/Detail Screen*
- *Receive RA Items Screen (Receiving Detail)*
- *Change RA Detail Screen*
- *RA Exchange Item Window (Review Exchange)*
- *Process RA Credits Screen*
- *Accepting or Rejecting Your Entries*

Screen Flow

When you are creating the first return authorization for an order:



When there is already a return authorization for the order:



Authority Level

Your authority level is determined by the following secured features:

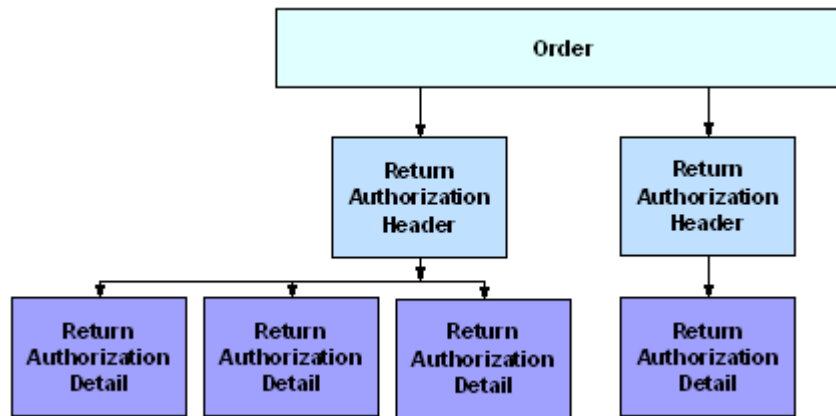
- [Enter Return Authorization \(A28\)](#): You must have enter authority for access to Work with Return Authorizations, or ability to create a return or exchange.
- [Receive Return Authorization \(A29\)](#): You must have *both* enter and receive authority to enter or receive a return authorization, or to create a misship return (because misships are created and received automatically).
- [Credit Return Authorization \(A34\)](#): You must have authority to *all* steps of return authorization (enter, receive, and credit) to process the credit.

Additionally, the [Delete Return Authorizations \(B03\)](#) secured feature controls the ability to delete a return authorization that has been created, but not yet received.

Work with Return Authorizations Screen

Purpose: Use this screen to select or review existing return authorizations for an order, or to advance to the screens you use to add a new return authorization for the order. This screen lists all return authorization headers, regardless of their processing stage, for the order and ship-to.

Order/header/detail structure: The relationship between the order and return authorization header and detail is illustrated in the chart below.



Each return or exchange of an item (detail record) must be associated with a header and an order. However, each order can have any number of return authorization headers, and each header can have any number of detail records.

How to display this screen: Select an order through the Work with Return Authorizations scan screens if there are already one or more return authorizations on the order; see [Selecting Orders for Return \(WRTA\)](#).

**Note:**

The [Edit Customer Actions](#) pop-up window may appear before this screen.

See messages: The text *SEE MSGS* appears in the upper right corner of the screen if:

- the [Display Customer Action Notes/Messages in RA \(F64\)](#) system control value is *selected*, and,
- there are any order messages for the order you selected.

You can display the [Work with Order Messages Screen](#) by selecting *Messages* in standard order inquiry.

Field	Description
Order #	A unique number to identify an order. Numeric, 7 positions; display-only, assigned by the system.
Ship-to number (Unlabeled field to the right of the order number)	The number of the shipping address on the order. Numeric, 3 positions; display-only, assigned by the system.
Customer name	The name of the customer who placed the order. Alphanumeric, 41 positions; display-only.
RA# (Return authorization number)	The number of the return authorization for the order and ship-to customer. The return authorization number ordinarily appears as a suffix to the combined order and ship-to number. Numeric, 3 positions; display-only, assigned by the system.

Field	Description
Quantity	A series of three fields to identify the quantity of the item the customer is returning, the quantity you have received, and the quantity credited, as follows: Entered The total quantity of all items that you have authorized the customer to return on this return authorization. Numeric, 5 positions; display-only. Received The total quantity of the returned items that you have received into your warehouse. Numeric, 5 positions; display-only. Credited The total quantity of the returned items for which you have issued credit. Numeric, 5 positions; display-only.
Date	Three fields indicating when the return was created, received, and credited. Entered The date you first created the return authorization. Numeric, 6 positions (in user date format); display-only. Received The date you received the customer's returned merchandise into your warehouse for the return authorization. If you received on multiple dates, the most recent date displays. Numeric, 6 positions (in user date format); display-only. Credited The date you issued a credit for the returned merchandise (for the quantity shown). Numeric, 6 positions (in user date format); display-only.
User	The system ID of the person who created the return authorization. Alphanumeric, 10 positions; display-only.

Screen Option	Procedure
Create a return authorization	Select <i>Create</i> to advance to the Work with Return Authorization Detail Screen and create a new return authorization header and detail record.
Work with an existing return authorization	Select <i>Work with</i> for a return authorization to advance to the Work with Return Authorization Detail Screen and add another return or exchange to the return authorization header, or to work with and process a return or exchange already in process for the header.
Receive returns	Select <i>Receive all</i> for a return authorization to receive all unreceived merchandise on that return authorization header. See Receiving All Returns .
Credit the return	Select <i>Process Credit</i> for a return authorization to advance to the Process RA Credits Screen .
Accept your entries	Select <i>Accept</i> . See Accepting or Rejecting Your Entries .

Screen Option	Procedure
Reject your entries, or exit the screen if you have not made any changes	Select <i>Reject</i> . See Accepting or Rejecting Your Entries .

Work with Return Authorization Detail Screen

Purpose: Use this screen to create, change, delete, or display returns or exchanges for a return authorization header. You can also use this screen to receive or credit returns, or to advance to other screens you use for receiving and crediting.

Accepting updates at this screen: Accepting entries on the Work with Return Authorization Detail screen is a final accept; if you reject entries on the [Work with Return Authorizations Screen](#), the system will not reject the entries that you accepted on the Work with Return Authorization Detail screen. For example, if you receive an RA on the Work with Return Authorization Detail screen and then select *Reject* on the [Work with Return Authorizations Screen](#), the RA will remain in a received status.

How to display this screen:

- Select an order from the Work with Return Authorization scan screens if no return authorizations exist for the order; see [Selecting Orders for Return \(WRTA\)](#)
- Select *Work with* for an existing return authorization header at the [Work with Return Authorizations Screen](#), or
- Select *Create* at the [Work with Return Authorizations Screen](#) to create a new return authorization header and detail

You can also advance to this screen by selecting *Work with* for a return authorization header through the Work with Return Authorization Receiving menu option; see [Receiving Returns \(WRAR\)](#).



Note:

The [Edit Customer Actions](#) window may appear before this screen.

See messages: The text *SEE MSGS* appears in the upper right corner of the screen if:

- the [Display Customer Action Notes/Messages in RA \(F64\)](#) system control value is *selected*, and,
- there are any order messages for the order you selected.

You can display the [Work with Order Messages Screen](#) by selecting *Messages* in standard order inquiry

Field	Description
RA Number (Return authorization number)	A number representing the return authorization header. This number consists of: Order number: numeric, 8 positions; display-only. Ship-to number: numeric, 3 positions; display-only. Return authorization number: numeric, 3 positions; display-only.
Customer #	This number identifies the customer who placed the order. Numeric, 9 positions; display-only; assigned by the system.

Field	Description
Customer name (Unlabeled field to the right of the customer number)	The name of the customer. Alphanumeric, 41 positions; display-only.
Ln # (Line number)	The line number of the return. Numeric, 3 positions; optional.
Item	The unit of inventory to be returned. The actual item code, rather than the alias, always displays here. Alphanumeric, 12 positions; optional.
SKU (Stock keeping unit)	The item's unique characteristics, such as its size and color. Alphanumeric, three 4-position fields; optional.
Qty to return (Quantity to return)	The quantity of the item authorized for return. Numeric, 5 positions; optional.
Qty rtn'd (Quantity returned)	The total quantity of the item that the customer has returned to date against a line. Alphanumeric, 2 positions; optional.
Rtn rsn (Return reason)	The reason that the customer is returning the item or items. A return reason code indicates whether returned items are defective, and are used for reporting purposes. You must enter either a return reason code or an exchange reason code. Return reason codes are defined in and validated against the Return Reason table. See Establishing Return Reason Codes (WRTR) . Numeric, 3 positions; optional.
Xch rsn (Exchange reason)	The reason that the customer is exchanging the item. An exchange reason code indicates whether returned items are defective, and are used for reporting purposes. You must enter either a return reason code or an exchange reason code. Exchange reason codes are defined in and validated against the Exchange Reason table. See Establishing Exchange Reason Codes (WEXR) . Numeric, 3 positions; optional.
WH (Warehouse)	Represents the warehouse to receive the return. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS) . Alphanumeric, 3 positions; optional.
Rtn dispn (Return disposition)	Controls how to handle the return (for example, whether to increase inventory). Return disposition codes are defined in and validated against the Return Disposition Values table. See Establishing Return Disposition Values (WRDV) . Alphanumeric, 2 positions; optional.
Location	A code that identifies the location in the warehouse to receive the return. Location codes are defined in and validated against the Location table; see Creating and Maintaining Locations (WLOC) . Alphanumeric, 7 positions; optional.

Field	Description
Description (Unlabeled field below the item code)	The description of the item and SKU, if any, separated by a space. Item description: 120 positions; display-only. SKU description: 20 positions; display-only.

Screen Option	Procedure
Change a return authorization	Select <i>Change</i> for an item to advance to the Change RA Detail Screen .
Delete a return authorization	Select <i>Delete</i> for a return authorization line to delete the line.

**Note:**

You can delete a return authorization record only if you have the proper authority, as controlled by the [Delete Return Authorizations \(B03\)](#) secured feature, and if the return has not yet been received. However, if you have received the return and not yet accepted your entries, you can reject the entries in the current session, then reselect the return authorization and delete the item.

Display a return authorization	Select <i>Display</i> for a return authorization line to advance to the Display RA Detail Screen .
Receive a returned line	Select <i>Receive line</i> for a return authorization line to advance to the Receive RA Items Screen (Receiving Detail) .
Create a return authorization	Select <i>Create</i> to display the R/A Select Order Detail Pop-Up Window .
Receive all lines	Select <i>Receive All</i> to receive all unreceived items on the return authorization. See Receiving All Returns .

Screen Option	Procedure
Accept your entries	Select <i>Accept</i> . See Accepting or Rejecting Your Entries .
	 Note: Accepting entries on the Work with Return Authorization Detail screen is a final accept; if you reject entries on the Work with Return Authorizations Screen, the system will not reject the entries that you accepted on the Work with Return Authorization Detail screen. For example, if you receive an RA on the Work with Return Authorization Detail screen and then select <i>Reject</i> on the Work with Return Authorizations Screen, the RA will remain in a received status.
Reject your entries	Select <i>Reject</i> . See Accepting or Rejecting Your Entries .
Process return authorization credit	Select <i>Process Credits</i> to advance to the Process RA Credits Screen .
Create a tickler for the order, sold to customer on the order, and/or bill to customer on the order	Select <i>Create tickler</i> to advance to the Create Tickler Screen .
	 Note: To create a <i>MN</i> tickler, you must have authority to the Create Manual Tickler (B13) secured feature.

R/A Select Order Detail Pop-Up Window

Purpose: This window lists all lines on the order that are eligible for return and do not currently have a return authorization in process. Use this window to select an order line for the return authorization.

How to display this window: Select *Create* at the [Work with Return Authorization Detail Screen](#).

Note:

If the window does not display any eligible items, or if you do not select one of the items at the window, the system assumes you are creating a return authorization for a misshipment or over-shipment. Therefore, selecting *Exit* closes the window and advances you to the [Create RA Detail Screen \(Processing Misships\)](#).

Field	Description
Seq #	The order line number. Numeric, 3 positions; optional.
Quantity shipped	The number of units of the item you have shipped to the customer. Numeric, 5 positions; optional.
Quantity returned	The number of units on the order line that have been received back into your warehouse to date. Numeric, 5 positions; optional.

Select an item: You can select an item for return by *Selecting* it. You advance to the [Create RA Detail Screen](#), where you can enter a return authorization for the selected item.

If there are no items on the order eligible for return, select *Exit* to advance to the [Create RA Detail Screen \(Processing Misships\)](#).

Create RA Detail Screen

Purpose: Use this screen to enter the detail information you need to create a return authorization.

How to display this screen: Select an item at the [R/A Select Order Detail Pop-Up Window](#). See [Create RA Detail Screen \(Processing Misships\)](#) if you selected *Exit* at the RA/Select Order Detail pop-up window to create a misship return.

Field	Description
RA number (Return authorization number)	A number representing the return authorization header. This number consists of the order number, ship to number, and return authorization number. Order number: numeric, 8 positions; display-only. Ship-to number: numeric, 3 positions; display-only. Return authorization number: numeric, 3 positions; display-only.
Line #	A number that identifies the line on the return authorization header. Numeric, 3 positions; display-only, assigned by the system.
Item	A code identifying the item being returned. <i>Misship:</i> The item field is required. Alphanumeric, 12 positions; display-only (or required for a misship return).
SKU (Stock keeping unit)	The item's unique characteristics, such as its color and size. <i>Misship:</i> The SKU is required for a SKU'ed item. Alphanumeric, three 4-position fields; display-only (or required for a misship return).
Order line#	The line number on the original order containing the item you selected for return. <i>Misship:</i> The order line number is zero. Numeric, 3 positions; display-only.

Field	Description
Invoice #	This field is made up of two segments, separated by a hyphen: Invoice number The number of the invoice on which you billed the item. Numeric, 7 positions; display-only. Line number (Unlabeled field to the right of the invoice number) The line number of the invoice on which the merchandise was billed. <i>Misship:</i> The invoice number and line number are 0 - 0. Numeric, 3 positions; display-only.
Refund freight	Indicates whether to refund freight to the customer when crediting the return. Valid values are: Valid values are: <i>Selected</i> = Refund freight. If a Freight override amount is defined for the order, the system advances you to the Enter Freight Refund Window. <i>Unselected</i> (default) = Do not refund freight. <i>To change after entry:</i> Although the refunding does not take place until the time you credit the return, you will not have an opportunity to change the setting at that time or at any time after receiving the return. To change the setting of this field before processing the credit, you must select <i>Change</i> for the item at the Work with Return Authorization Detail Screen to advance to the Change RA Detail Screen. This field is enterable at the Change RA Detail screen only if you have full authority to create, receive, and credit return authorizations.
Refund add'l chgs (Refund additional charges)	Indicates whether to refund additional charges when crediting the return. If there were negative additional charges billed on the order, refunding them results in adding positive additional charges, or decreasing the net amount of any refund. Valid values are: <i>Selected</i> = Refund additional charges. <i>Unselected</i> (default) = Do not refund additional charges. <i>To change after entry:</i> Although the refunding does not take place until the time you credit the return, you will not have an opportunity to change the setting at that time or at any time after receiving the return. To change the setting of this field before processing the credit, you must select <i>Change</i> for the item at the Work with Return Authorization Detail Screen to advance to the Change RA Detail Screen. This field is enterable at the Change RA Detail screen only if you have full authority to create, receive, and credit return authorizations.
Refund handling	Indicates whether to refund handling charges when crediting the return. Valid values are: <i>Selected</i> = Refund handling. <i>Unselected</i> (default) = Do not refund handling. <i>To change after entry:</i> Although the refunding does not take place until the time you credit the return, you will not have an opportunity to change the setting at that time or at any time after receiving the return. To change the setting of this field before processing the credit, you must select <i>Change</i> for the item at the Work with Return Authorization Detail Screen to advance to the Change RA Detail Screen. This field is enterable at the Change RA Detail screen only if you have full authority to create, receive, and credit return authorizations.

Field	Description
Refund duty	Indicates whether to refund duty charges when crediting the return. Valid values are: <i>Selected</i> (default) = Refund duty. <i>Unselected</i> = Do not refund duty. <i>To change after entry:</i> Although the refunding does not take place until the time you credit the return, you will not have an opportunity to change the setting at that time or at any time after receiving the return. To change the setting of this field before processing the credit, you must select <i>Change</i> for the item at the Work with Return Authorization Detail Screen to advance to the Change RA Detail Screen. This field is enterable at the Change RA Detail screen only if you have full authority to create, receive, and credit return authorizations.
Qty to return (Quantity to return)	The total number of units to return. Unless you are entering a misship, you cannot enter an amount greater than the unreturned quantity or the screen displays an error message; you must enter any additional quantity as a misship. Numeric, 5 positions; required.
Unreturned quantity	The quantity of the item that has been shipped and not yet returned. <i>Misship:</i> The unreturned quantity is zero. Numeric, 5 positions; display-only.
Qty returned (Quantity returned)	The total quantity of the item that the customer has returned to date on this return authorization detail record. The system does not update this field until you process receipt of the returned item. Numeric, 5 positions; display-only.
Qty credited (Quantity credited)	The total quantity of the item for which a credit has been issued. The system does not update this field until you process the credit for a returned item. Numeric, 5 positions; display-only.
Return reason	The reason that the customer is returning the item or items. A return reason code indicates whether returned items are defective, and are used for reporting purposes. You must enter either a return reason code or an exchange reason code. You can use different return reason codes, or a mix of return reason codes and exchange reason codes, if you are processing returns against the same item but for different reasons. For example, if the customer is returning four units but one unit is damaged, you could process the return for that unit using a different return reason code. However, you cannot have more than one return in process for an item against the same location. <i>Time of update:</i> The system does not post updates that include the return reason code until you receive the return. Return reason codes are defined in and validated against the Return Reason table. See Establishing Return Reason Codes (WRTTR). Numeric, 3 positions; required if you do not enter an exchange reason code.

Field	Description
Exchange reason code	The reason that the customer is exchanging the item. An exchange reason code indicates whether returned items are defective, and are used for reporting purposes. You must enter either a return reason code or an exchange reason code. If you enter an exchange reason code, you advance automatically to the Enter Exchange Item Screen or window if the Require Exchange Item at Time of Receipt (F42) system control value is <i>unselected</i>; otherwise, you do not advance to this screen until the time you receive the return. You can use different exchange reason codes, or a mix of return reason codes and exchange reason codes, if you are processing exchanges against the same item but for different reasons. For example, if the customer is exchanging four units but one unit is damaged, you could process the exchange for that unit using a different exchange reason code. However, you cannot have more than one return or exchange in process for an item against the same location. <i>Retail pickup or delivery orders:</i> This field is not available when you are working with a retail pickup or delivery order. See Maintaining Retail Pickup or Delivery Orders from Order Orchestration for a discussion. <i>Time of update:</i> The system does not post updates that include the exchange reason code until you receive the return. Exchange reason codes are defined in and validated against the Exchange Reason table. See Establishing Exchange Reason Codes (WEXR). Numeric, 3 positions; required if you do not enter a return reason code.
Disposition code	A code that identifies how a returned item is handled by the system, in terms of whether the return updates inventory and the warehouse and location to which the item is returned. <i>Required for return:</i> You must enter a valid return disposition code when performing any type of return, such as a straight return, entering an exchange item, etc. The return disposition code defined in the Default Disposition Code (C18) system control value defaults, but you can override it. For returns initiated from an outside system such as a third-party warehouse management system, if there is no return authorization for the order, the system assigns the return disposition code defined in the Default Return Disposition Code for Inbound Returns (H65) system control value to the return.

Field	Description
	<i>Affect inventory?</i> If the return disposition code affects inventory (meaning that the item is returned into active inventory and update the on-hand quantity in the specified location), the system requires the warehouse and location where the item is returned. If the disposition code is set up to affect inventory and return to the primary location, the system will check for a primary location in the Item record. If one is available, the system will return the item automatically to this warehouse location. If one is not available or if the disposition code is not set up to receive returns in the primary location, the system will receive the return in the warehouse and location defined in the Return Disposition record; however, you can override these values to return the item to an alternate location. If the item/location does not exist, the system will create a record in the Item/Location table automatically. Regardless of whether the return disposition code specifies returning to the primary location, if the system control value Display "No Primary Location" Message in Returns (G46) is selected, and an item does not have a primary location, a pop-up window will display when you select <i>OK</i> to validate your entries and then select <i>OK</i> again to update the record; the pop-up window warns you that a primary location for the item does not exist. Select <i>Cancel</i> to cancel the window and either change the return disposition code, or select <i>OK</i> again to retain the disposition code you have already entered. <i>Time of update:</i> The system does not post updates that include the return disposition code until you receive the return. <i>Authority:</i> You can set authority to process a return for a specific return disposition value at the user or user class level. This can be a blanket authority for all disposition values, or can be specific to individual codes. See Establishing Return Disposition Values (WRDV). An error message indicates if you do not have authority to the return disposition code specified: User Does not have authority to return disposition code 4A. Alphanumeric, 2 positions; required.
Warehouse	The code representing the warehouse where the item is or items are being returned. When you are returning a single item, if there is a default warehouse and primary location specified for the item or SKU, the warehouse defaults here, but you can override it. <i>Time of update:</i> The system does not post updates that include the warehouse until you receive the return. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions; required if the return disposition value affects inventory.

Field	Description
Location	The code representing the location within the warehouse where the item is being returned. If there is a default warehouse and primary location specified for the item or SKU, the location defaults here, but you can override it. <i>Time of update:</i> The system does not post updates that include the location until you receive the return. Location codes are defined in and validated against the Location table; see Creating and Maintaining Locations (WLOC). Alphanumeric, 7 positions; required if the return disposition value affects inventory.

Drop ship orders from multiple vendors: Order Administration does not allow you to create returns for multiple drop ship vendors at the same time. If you complete this screen for a second drop ship vendor on a single return, the system displays the following error message when you select *OK*: Returns against multiple drop ship items/vendors not allowed at the same time.

You must complete your return for the first vendor and create another return for each subsequent vendor on the order.

Completing the Create RA Detail Screen

Enter Exchange Item screen: If you entered an exchange reason code and if the [Require Exchange Item at Time of Receipt \(F42\)](#) system control value is *unselected*, you advance to the [Enter Exchange Item Screen](#) or window. If you are not processing an exchange, you return to the [Work with Return Authorization Detail Screen](#).

No primary location warning: If the item does not have a primary location, the system displays an informational pop-up window when you select *OK* if the [Display "No Primary Location" Message in Returns \(G46\)](#) system control value is *selected*.

Scan Return ID window: If the [Display Return ID Window \(L99\)](#) system control value is *selected*, the system advances you to the [Scan Return ID Window](#) after you complete the required information on this screen and select *OK*. This window allows you to assign a return ID to the RA detail line in order to identify the return in an external system.

Select *Exit* to exit the screen without creating the return authorization.

Enter Freight Refund Window

Use this window to enter the freight amount to refund.

How to display this screen: This window displays if you select the Refund freight field on the [Create RA Detail Screen](#), a [Freight override](#) amount is defined for the order, and the Calculate freight field for the order ship to is selected.

Field	Description
Current freight amount	The current freight amount for the order, based on the Freight override amount on the Display Order Properties Screen. Numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
Freight refund	The amount of freight to refund. Freight tax override: If a Freight tax override is defined for the order, the system uses the Freight tax rate to calculate the amount of tax on freight to refund. Numeric, 20 positions with a 2-place decimal; required.

Instructions:

1. Enter the amount of freight to refund in the Freight refund field.
2. Select OK. The system subtracts the freight refund amount from the current freight amount and updates the [Freight override](#) amount on the [Display Order Properties Screen](#) with the new [Freight override](#) amount. If a [Freight tax override](#) is defined for the order, the system uses the [Freight tax rate](#) to determine the new freight tax amount.

Example: You return a line on an order whose freight override amount is \$10.00 and freight tax override amount is \$2.50. The freight tax rate is 25%. At the Enter Freight Refund window, you enter \$4.00 as the freight refund amount. Based on the freight refund amount, the system:

- Refunds \$4.00 freight and \$1.00 freight on tax.
- Updates the freight override amount to \$6.00.
- Updates the freight tax override amount to \$1.50.

Enter Exchange Item Screen

Purpose: Use this screen to enter an exchange item and quantity for the returning merchandise.

How to display this screen: You advance to this screen when you enter an exchange reason code on the [Create RA Detail Screen](#) if the *Require Exchange Item at Time of Receipt (F42)* system control value is *selected*; otherwise, you advance to this screen at the time you receive the return. You can also display this screen through the [Receiving Returns \(WRAR\)](#) menu option.

Retail pickup or delivery orders: This screen is not available when you are working with a retail pickup or delivery order. See [Maintaining Retail Pickup or Delivery Orders from Order Orchestration](#) for a discussion.

Pop-up or screen: Depending upon whether you are processing a misship, receiving individual items, or receiving all returns, a pop-up window may display instead of a screen; however, all fields are the same on both the screen and the window.

Field	Description
RA number	A number representing the return authorization. You create a new return authorization header record each time you create a return authorization for an item. This number consists of the order number, ship to number, and return authorization number. Order number: numeric, 8 positions; display-only. Ship-to number: numeric, 3 positions; display-only. Return authorization number: numeric, 3 positions; display-only.
RA line #	The return authorization line associated with the exchange. Numeric, 3 positions; display-only.

Field	Description
Offer	The offer to use for tracking demand for the exchange item. The offer originally used on the order defaults. Offers are defined in and validated against the Offer table. See Working with Offers (WOFR). Alphanumeric, 3 positions; required.
Item	A code that identifies the unit of merchandise the customer is requesting in exchange for the return. You can enter a cross reference code that represents another system's item and SKU code in this field. If you enter a cross reference code, the system searches the SKU Cross Reference table alphanumerically for the first Order Administration item and SKU that is associated with this cross reference code. See Updating SKU Offer Prices (MUSK). Alphanumeric, 12 positions; required.
SKU (Stock keeping unit)	The item's unique characteristics, such as its size and color. Alphanumeric, three 4-position fields; required if the item has SKUs.
Qty ordered (Quantity ordered)	The total of the exchange item to ship to the customer. Numeric, 5 positions; required.
No charge	Indicates whether the exchange item should be given to the customer at no charge. Values are: • <i>No Charge</i> = This is a no charge item. • <i>Priced</i> = Charge the customer for this item.
Use existing price	Controls whether the system will apply the unit price of the returned item for each unit you ship of the replacement item, resulting in no net increase or decrease in merchandise charge for the exchange. This might be useful if you sold the original item at a discount and want to replace the item without imposing the regular, non-discounted price. However, if you enter Y in this field, the system uses the original item price whether it was higher or lower than the returned item price. Valid values are: • <i>Selected</i> = Use the price of the original item for the replacement item. • <i>Unselected</i> (default) = Use the regular price of the replacement item.

**Note:**

The system requires that you have defined a default price override reason in the [Price Override Reason for Same Price Exchanges \(D92\)](#) system control value if you selected it. If no default has been defined, a message displays:

Price Override Reason Code not found (SCV=D92).

Field	Description
Override price	The price at which the item is added to the order. You cannot enter an override price if the Use existing price field is <i>selected</i>. Note: To enter an override price, you must have authority to the secured feature Price Overrides (A23).
Override reason	Even if you have authority to override prices, the percentage you can discount the existing price may be limited by system control value E55, Price Override Limit Percent, unless you have authority to secured feature Override Price Override Limit (A64), which allows you to override the limit percent defined in the system control table. Alphanumeric, 13 positions with a 2-place decimal; optional. The reason you enter an override price. Price override reasons are defined in and validated against the Price Override Reason table. See Establishing Price Override Reason Codes (WPOR). Alphanumeric, 1 position; required if you enter a price in the Override price field.
Ship via	The shipper to deliver the exchange item. The shipper who originally shipped the order is used if you do not enter a default. The system validates that the ship via code you enter is set up as an SCF/ship via combination; otherwise, the screen displays an error message. Ship via codes are defined in and validated against the Ship Via table. See Working with Ship Via Codes (WVIA). Numeric, 2 positions; optional.
Warehouse	The warehouse from which the exchange item should ship. Otherwise, the system uses the default specified for the item or SKU. The system validates that there is a record of the exchange item in the warehouse you enter; otherwise, the screen displays an error message. Warehouse codes are defined in and validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions; optional.

Completing this screen:

- If the original shipment was an express bill, the Enter Location pop-up window displays. See [Entering Orders](#) for more information on completing this window.
- If there are any item comments associated with the exchange item you entered, you advance to the [Work with Item/SKU Comments Window](#).

The table below indicates how the exchange item is priced, based on the setting of the No charge, Use existing price, Override price and Override reason fields.

No charge	Use existing price	Override price and reason	Results
Priced	blank	blank	Add the exchange item to the order using the regular price.
Priced	selected	blank	Add the exchanged item to the order using the existing price of the return item.
Priced	blank	10.00, P	Add the exchange item to the order using the override price of 10.00 and the price override reason P.
No Charge	blank or selected	blank	Add the exchange item to the order for 0.00 using the override reason defined in the Default Price Override Reason (B35) system control value.

Create RA Detail Screen (Processing Misships)

Purpose: Use this screen to process a misship return.

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

Required authority: When you enter a misship, the return authorization is created and received at once. For this reason, you must have authority to create and receive return authorizations to enter a misship.

How to display this screen: You can display this screen by selecting *Create* at the [Work with Return Authorization Detail Screen](#), and then selecting *Exit* at the [R/A Select Order Detail Pop-Up Window](#) without selecting an item for return. Select *Exit* if you do not wish to enter a misship item.

Receiving All Returns

Purpose: Through the Work with Return Authorizations menu option (standard process), you can receive a return by:

- *Receive all/header screen:* selecting *Receive line* for the return authorization header at the [Work with Return Authorizations Screen](#)
- *Receive detail:* selecting *Receive line* for the return authorization detail at the [Work with Return Authorization Detail Screen](#)
- *Receive all/detail screen:* selecting *Receive all* at the [Work with Return Authorization Detail Screen](#)

Each method of receiving returns is described below.



Note:

You can also receive returns through the [Receiving Returns \(WRAR\)](#) menu option.

Pick slip preparation: When you receive an item that has been exchanged, the system performs pick slip preparation for the exchange item; see [Preparing Orders for Pick Slip Generation](#).

Receive All/Header Screen

Use this option if you do not need to review the items on the return authorization before receiving.

Select *Receive line* for the return authorization header at the [Work with Return Authorizations Screen](#).

An error message indicates if there are no current return authorizations ready for receipt, or if you do not have authority to receive. Also, if you have not yet entered exchange item information for an exchange, you advance to the [Enter Exchange Item Screen](#).

After you select *OK* and complete any necessary exchange information, the *Received* date changes to the current date. You can then select *Reject* to reject your entries, select *Accept* to accept, or continue working on the Work with Return Authorizations screen.

You must accept or reject before leaving this screen. If you choose to create another return authorization header by selecting *Create* or work with a return authorization by selecting *Display* for it, the Confirm Accept pop-up window displays; see [Accepting or Rejecting Your Entries](#).

Receive All/Detail Screen

Use this option if you want to review the individual items before receiving the entire return authorization. Select *Receive All* at the [Work with Return Authorization Detail Screen](#) to receive all items on return authorizations that have been created but not yet received.

An error message indicates if there are no items on the return authorization eligible for receipt, or if you do not have authority to receive.

You can then Select *Reject* to reject your entries, Select *Accept* to accept, or continue working on the Work with Return Authorization Detail screen. If you choose to process credits by selecting *Process Credits*, the Confirm Accept pop-up window displays; see [Accepting or Rejecting Your Entries](#).

Receive RA Items Screen (Receiving Detail)

Purpose: Use this option if you want to select individual items on the return authorization to receive.

How to display this screen:

- Select *Display* for a return authorization header at the [Work with Return Authorizations Screen](#).
- Select *Receive Line* for the item(s) you are receiving at the [Work with Return Authorization Detail Screen](#).

You can also display this screen by selecting *Receive line* for an item at the [Receive Returns Screen](#) through the [Receiving Returns \(WRAR\)](#) menu option.

An error message indicates if you select an item that has already been received, or if you do not have authority to receive. If there is an exchange reason code for the return and you need to complete the exchange information, you advance first to the [Enter Exchange Item Screen](#).

Complete the screen to process the receipt; otherwise, select *Exit* to cancel. The only enterable fields on this screen are the [Qty returned \(Quantity returned\)](#), [Warehouse](#), and [Location](#). Each field on this screen is described under [Create RA Detail Screen](#).

When you return to the Work with Return Authorization Detail screen, the [Qty rtn'd \(Quantity returned\)](#) field is updated.

You can then select *Reject* to reject your entries, select *Accept* to accept, or continue working on the Work with Return Authorization Detail screen. If you choose to process credits by selecting *Process Credits*, the Confirm Accept pop-up window displays; see [Accepting or Rejecting Your Entries](#).

Change RA Detail Screen

To change: Select *Change* for a return authorization at the [Work with Return Authorization Detail Screen](#) to advance to the Change RA Detail screen. See [Create RA Detail Screen](#) for field descriptions.



Note:

The Refund freight, Refund additional charges, Refund handling and Refund duty fields are enterable at this screen only if you have full authority to create, receive, and credit a return authorization.

RA Exchange Item Window (Review Exchange)

Purpose: Use this window to review information on the item to ship in exchange for a returned item.

How to display this window: You can display this window by selecting *Review exchange* at the [RA Exchange Item Window \(Review Exchange\)](#). If there is not an exchange item to be shipped for the return, the screen displays an error message.

About this window: Each field on this window is described earlier in this topic in [Enter Exchange Item Screen](#).

Process RA Credits Screen

Purpose: Use this screen to credit return authorizations.

How to display this screen:

- Selecting *Process Credits* for the return authorization header at the [Work with Return Authorizations Screen](#)
- Selecting *Process Credits* at the [Work with Return Authorization Detail Screen](#)

You can also display this screen through the Work with Return Authorization Receiving and Work with Return Authorization Credits menu options, described in [Receiving Returns \(WRAR\)](#), and [Crediting Returns \(WRAC\)](#).

For more information: See [Crediting Returns \(WRAC\)](#) for information on processing credits.

Accepting or Rejecting Your Entries

- [Accepting Your Entries](#)
- [Rejecting Your Entries](#)

Pick slip preparation: When you accept or reject a return authorization, the system determines if the order qualifies for pick slip preparation and applies it to the order. If you add an exchange item to the order, the system performs pick slip preparation for the exchange item when you receive the return authorization. See [Preparing Orders for Pick Slip Generation](#).

Accepting Your Entries

Select *Accept* to accept all of your entries during the current session at each screen when *Working with Return Authorizations: Standard Process*. Depending on your entries, the updates made at this point are as follows:

- [Create Return Authorization](#)
- [Receive Return Authorization](#)
- [Credit Return Authorization](#)

Create Return Authorization

The return authorization record(s) is/are created, and a message is written to order history:

7/17/06 M Order was maintained through R/A. 26.25 EJOHNSON

Note that the dollar amount that displays with this message refers to the entire order total, not just the dollar value of any return.

If the return authorization was created through the e-commerce interface: You can enable your web customers to create return authorizations on the storefront. When a return authorization is created through this method, a message such as the following is written to order history:

7/14/06 N RA 5525-1-1 created from the web.



Note:

Note that this message does not include a dollar amount or user ID.

You can review these messages by selecting *Order History* in standard order inquiry to advance to the [Display Order History Screen](#). They are also available for review by selecting *History* in streamlined order inquiry.

Return authorization download triggers: If the [Create Return Download Triggers \(K28\)](#) system control value is *selected*, the system creates a return authorization download (RAD) trigger when you create, change, or delete a return authorization line, based on the trigger rules defined for the Return Authorization Download (RETURN_OUT) integration layer job. The RETURN_OUT integration layer job monitors for return authorization download triggers and generates a *Return Authorization Outbound XML Message (CWReturnRAOut)* to send the return authorization information to a remote system.

Receive Return Authorization

Receipts are processed through the ORDR_ASYNC job. Updates include:

- The inventory for the item, including increasing on-hand in the item location and item warehouse, and adding an inventory transaction history record
- the order, including the order detail and order line history
- for an exchange, adds the exchange item to the order
- the return authorization header and detail

Credit Return Authorization

Credits are processed through the ORDR_ASYNC and BILL_ASYNC jobs, which update:

- the order, including order history, and creating the credit invoice and refund, if appropriate. Any unbilled additional charges on the order bill at this time, as well
- the return reason or exchange reason history for the offer
- the return authorization header and detail record.



Note:

Refunds can be either positive (you owe the customer money) or negative (the customer owes you money).

Select Active Pay Method screen: The system displays the Select Active Pay Method screen when you accept the return authorization if there is a deactivated payment method on the order. Use this screen to select the active payment method to receive the credit.

Rejecting Your Entries

Select *Reject* to reject all of your entries during the current session. Any updates to the return authorization tables is undone, and additional updates do not take place.



Note:

Accepting entries on the [Work with Return Authorization Detail Screen](#) is a final accept; if you reject entries on the [Work with Return Authorizations Screen](#), the system will not reject the entries that you accepted on the [Work with Return Authorization Detail Screen](#). For example, if you receive an RA on the [Work with Return Authorization Detail Screen](#) and then select *Reject* on the [Work with Return Authorizations Screen](#), the RA will remain in a received status.

Working with Return Authorizations: Streamlined Process

Purpose: If the [Use Streamlined Return Authorizations \(F44\)](#) system control value is *selected*, when you process return authorizations:

- When you select an order for returns processing, the screen displays each item on that order that is available for returns processing. Items are available for return if they have been shipped and a return has not yet been completely processed.
- Depending on your authority to create, receive, and credit return authorizations, returns are processed automatically as far as your authority extends. For example, you cannot specify that you want to "create only" if you also have authority to receive, or to receive and credit.
- You can review order line history while processing returns.
- You can work with additional charge codes while processing returns.

See [Working with Return Authorizations: Standard Process](#) for more information on how standard processing works.

Selecting an order: The process you use to select an order for return authorization processing is the same regardless of whether you use the standard or streamlined process. See [Selecting Orders for Return \(WRTA\)](#).

Authority level: Your authority level is determined by the following secured features:

- [Enter Return Authorization \(A28\)](#)
- [Receive Return Authorization \(A29\)](#)
- [Credit Return Authorization \(A34\)](#)

Additionally, the [Delete Return Authorizations \(B03\)](#) secured feature controls the ability to delete a return authorization that has been created, but not yet received.

Return authorization download triggers: If the [Create Return Download Triggers \(K28\)](#) system control value is *selected*, the system creates a return authorization download (RAD) trigger when you create, change, or delete a return authorization line, based on the trigger rules defined for the Return Authorization Download (RETURN_OUT) integration layer job. The RETURN_OUT integration layer job monitors for return authorization download triggers and generates a Return Authorization Outbound XML Message (CWReturnRAOut) to send the return authorization information to a remote system.

Retail pickup or delivery orders: You can process a return against a retail pickup or delivery order; however, shipping the order deactivates the [Order Broker Payment Type \(K98\)](#) applied to these orders, so you would then need to enter a new payment method in order to process the related refund.

**Note:**

You cannot process an exchange against a retail pickup or delivery order.

The system does not send a status update to Order Orchestration when you process a return against a retail pickup or delivery order.

See [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for an overview.

Pick slip preparation: When you select an order for return authorization, the system removes any pick slip preparation from the order. When you accept or reject the return authorization, the system determines if the order qualifies for pick slip preparation and reapplies it to the order. If you add an exchange item to the order, the system performs pick slip preparation for the exchange item when you receive the return authorization. See [Preparing Orders for Pick Slip Generation](#).

In this topic:

- [Work with Returns for Order Screen](#)
- [Return/Exchange Item Screen \(Creating a Return\)](#)
- [Enter Exchange Item Screen](#)
- [Return/Exchange Item Screen \(Create/Return All\)](#)
- [Change RA Detail Screen \(Complete/Process a Return for an Item\)](#)
- [Display RA Detail Screen](#)
- [RA Exchange Item Window](#)
- [Work with RA Detail for Item Screen](#)

- [Accepting or Rejecting](#)

Work with Returns for Order Screen

Use this screen to create and process return authorizations as far as your authority extends. From this screen, you can also display a return authorization in process, review order line history, advance to standard order inquiry, or work with additional charges.

This screen displays each item on the order eligible for a return (that is, all shipped items that have not yet had returns fully processed).



Note:

The [Edit Customer Actions Window](#) may appear before this screen.

How to display this screen: Select an order through the Work with Return Authorizations scan screens; see [Selecting Orders for Return \(WRTA\)](#).

See messages: The text *SEE MSGS* appears in the upper right corner of the screen if:

- the [Display Customer Action Notes/Messages in RA \(F64\)](#) system control value is *selected*, and,
- there are any order messages for the order you selected.

You can select *Order Inquiry* to advance to standard order inquiry and select *Messages* to display the [Work with Order Messages Screen](#).

Field	Description
Order number	A number to identify an order. Numeric, 7 positions; display-only, assigned by the system.
Ship-to number (Unlabeled field to the right of the order number)	A number that identifies the shipping address on an order; separated from the order number by a hyphen. Numeric, 3 positions; display-only, assigned by the system.
Customer #	This number identifies the customer who placed the order. Numeric, 9 positions; display-only; assigned by the system.
Customer name (Unlabeled field to the right of the customer number)	The name of the customer. Alphanumeric, 41 positions; display-only.
Ln# (Line number)	The number of the order line containing the item eligible for return. Numeric, 3 positions; optional.
Item	The code representing the item eligible for return. If the Display Item Alias (D56) system control value is <i>selected</i> , and if the customer ordered this item using an alias, the alias displays. Alphanumeric, 12 positions; optional.

Field	Description
SKU	The item's unique characteristics, such as its color or size. Only items on the order that are eligible for return display on this screen. To be eligible for return, there must be at least one unit that has been shipped and not fully returned and credited. If the Display SKU Description in place of SKU Element (F25) system control value is <i>selected</i>, the first 14 positions of the description of the SKU displays instead. Scanning on this field is not currently implemented. Alphanumeric, three 4-position fields; optional.
Qty shipped	The total quantity of the item that has been shipped to the customer. Numeric, 5 positions; display-only.
Qty rtn'd (Quantity returned)	The total quantity of the item that has been received at your warehouse as a return, either in a previous or in the current session. Numeric, 5 positions; display-only.
Qty crtd (Quantity credited)	The total quantity of the item that has been fully returned and credited, either in a previous or in the current session. Numeric, 5 positions; display-only.
RA pend (Return authorization pending)	Indicates whether there is currently a return authorization in process for this item. Valid values are: <i>Selected</i> = There is currently a return authorization in process for this item. This flag displays if a return was partially processed during a previous session or the current session, or if you have selected to fully process the return in the current session, but have not yet selected <i>Accept</i> to process the updates. <i>Unselected</i> = There is not currently a return authorization in process for this item.

Screen Option	Procedure
Display a return authorization in process	Select <i>Display</i> for an item. <i>Single return authorization:</i> You advance to the Display RA Detail Screen if there is just one return authorization in process for the item. <i>Multiple return authorizations:</i> You advance to the Work with RA Detail for Item Screen.
Begin a new return authorization against an item	Select <i>Create/process return</i> for an item to advance to the Return/Exchange Item Screen (Creating a Return).
Complete processing an existing return authorization against an item	Select <i>Complete/process return(s)</i> for the item. <i>Single return authorization:</i> You advance to the Change RA Detail Screen (Complete/Process a Return for an Item) if there is just one return authorization in process for the item. <i>Multiple return authorizations:</i> You advance to the Work with RA Detail for Item Screen.
Display order line history for an item	Select <i>Order line history</i> for an item to advance to the Display Order Line History Screen.
Create a misship return	Select <i>Create misship</i>. See Create RA Detail Screen (Processing Misships).

Screen Option	Procedure
Advance to standard order inquiry	Select <i>Order Inquiry</i> to advance to the Order Inquiry Header Screen or the Order Inquiry Detail Screen , depending on the setting of the Default Version for Order Inquiry (C34) system control value.
Begin return authorization for all displayed items	Select <i>Create/Return all</i> to advance to the Return/Exchange Item Screen (Creating a Return) .
Accept your entries	Select <i>Accept</i> . See Accepting or Rejecting .
Reject your entries	Select <i>Reject</i> See Accepting or Rejecting .
Work with additional charges for the order	Select <i>Additional Charges</i> to display the Enter Additional Charges pop-up window. See Adding Miscellaneous Charges or Credits in Order Entry .

 Note:

Additional charges bill the next time a transaction on the order (such as crediting a return) goes through billing.

Create a tickler for the order, sold to customer on the order, and/or bill to customer on the order

Select *Create tickler* to advance to the [Create Tickler Screen](#).

 Note:

To create a *MN* tickler, you must have authority to the [Create Manual Tickler \(B13\)](#) secured feature.

Return/Exchange Item Screen (Creating a Return)

Purpose: Use this screen to begin processing a return or exchange against an item. When you accept your entries against the order, the return authorization will be processed as far as your authority extends.

 Note:

You use the same screen when creating return authorizations for the entire order at once; however, its fields are different. See [Return/Exchange Item Screen \(Create/Return All\)](#).

How to display this screen: Select *Create/process return* for an item at the [Work with Returns for Order Screen](#). If the item is not available for a new return authorization because a return authorization has been entered for each shipped unit already, the screen displays an error message:

No returns left to create - function not processed.

Returning an item with no primary location: You may receive returns for items which have no primary location, such as items you have previously liquidated and sold through an outlet store, or drop ship items which are returned directly to your drop ship vendor. For these items, if you have selected the [Display "No Primary Location" Message in Returns \(G46\)](#) system control value, the system displays a pop-up window indicating that a primary location for the item does not exist when you enter and validate an item as a return or a mis-ship.

This window is informational only. You can select *Cancel* to cancel the window, and then, if you wish, change the return disposition code before updating your entries and accepting/processing the return.



Note:

This pop-up window displays only when you are posting a return for a single item; if you have advanced to the Return/Exchange Item screen selecting *Create/Return all*, the warning window does not appear, regardless of the setting in the [Display "No Primary Location" Message in Returns \(G46\)](#) system control value, or of whether any item on the order has no defined primary location.

Field	Description
Item	The code representing the item you selected at the Work with Returns for Order Screen for return or exchange. If the Display Item Alias (D56) system control value is <i>selected</i>, and the customer ordered by alias, then the alias displays. This field does not display when you select <i>Create/Return all</i> to create/return all. Alphanumeric, 12 positions; display-only.
SKU (Stock keeping unit)	The item's unique characteristics, such as its size and color. This field does not display when you select <i>Create/Return all</i> to create/return all. Alphanumeric, three 4-position fields; display-only.
Description	The description of the item. This field does not display when you select <i>Create/Return all</i> to create/return all. Alphanumeric, 120 positions; display-only.
RA # (Return authorization number)	A number representing the return authorization. If you have authority to create, but not receive or credit, return authorizations, you create a new return authorization header record each time you create a return authorization for an item. Regardless of your authority level, however, one or more items would have the same return authorization number if you selected <i>Create/Return all</i> to return them all at once. This number consists of the order number, ship to number and return authorization number. Order number: numeric, 8 positions; display-only. Ship-to number: numeric, 3 positions; display-only. Return authorization number: numeric, 3 positions; display-only.

Field	Description
Qty to return	Enter the quantity of the item you are returning or exchanging to the same location and with the same return or exchange reason code. You cannot enter a number greater than the unreturned quantity that displays to the right. <i>Time of update:</i> The system does not post updates related to the quantity until you receive the return; so if you have create authority only, the operator who processes the receipt or receipt/credit can change the quantity. This field does not display when you select <i>Create/Return all</i> to create/return all. Numeric, 5 positions; required.
Unreturned quantity	The quantity of the item available to return. This is the quantity that is not included in another previous or current return. This field does not display when you select <i>Create/Return all</i> to create/return all. Numeric, 5 positions; display-only.
Return reason	The reason that the customer is returning the item or items. A return reason code indicates whether returned items are defective, and is used for reporting purposes. You must enter either a return reason code or an exchange reason code. You can use different return reason codes, or a mix of return reason codes and exchange reason codes, if you are processing returns against the same item but for different reasons. For example, if the customer is returning four units but one unit is damaged, you could process the return for that unit using a different return reason code. However, you cannot have more than one return in process for an item against the same location. <i>Time of update:</i> The system does not post updates that include the return reason code until you receive the return; so if you have create authority only, the operator who performs the receipt or receipt/credit can change the return reason at that time, or change from a return reason to an exchange reason. Return reason codes are defined in and validated against the Return Reason table. See Establishing Return Reason Codes (WRTR). Numeric, 3 positions; required if you do not enter an exchange reason code or when you select <i>Create/Return all</i> to create/return all.
Exchange reason code	The reason that the customer is exchanging the item. An exchange reason code indicates whether returned items are defective, and are used for reporting purposes. You must enter either a return reason code or an exchange reason code. If you enter an exchange reason code, you advance automatically to the Enter Exchange Item Screen or window depending on your authority level and the setting of the Require Exchange Item at Time of Receipt (F42) system control value. For example, if you have authority only to create a return authorization, not to return or credit, and if this system control value is <i>selected</i>, you will not need to enter an exchange item at this time.

Field	Description
	You can use different exchange reason codes, or a mix of return reason codes and exchange reason codes, if you are processing exchanges against the same item but for different reasons. For example, if the customer is exchanging four units but one unit is damaged, you could process the exchange for that unit using a different exchange reason code. However, you cannot have more than one return or exchange in process for an item against the same location. <i>Retail pickup or delivery orders:</i> This field is not available when you are working with a retail pickup or delivery order. See Maintaining Retail Pickup or Delivery Orders from Order Orchestration for a discussion. <i>Time of update:</i> The system does not post updates that include the exchange reason code until you receive the return; so if you have create authority only, the operator who performs the receipt or receipt/credit can change the exchange reason at that time, or change from an exchange reason to a return reason. If you change from an exchange reason to a return reason and had already specified an exchange item, the exchange item will not be added to the order. This field is not available when you select <i>Create/Return all</i> to create/return all. Exchange reason codes are defined in and validated against the Exchange Reason table. See Establishing Exchange Reason Codes (WEXR). Numeric, 3 positions; required if you do not enter a return reason code.
Return disposition	A code that identifies how a returned item will be handled by the system, in terms of whether the return updates inventory and the warehouse and location to which the item will be returned. <i>Required for return:</i> You must enter a valid return disposition code when performing any type of return, such as a straight return, entering an exchange item, and so on. The return disposition code defined in the Default Disposition Code (C18) system control value defaults, but you can override it. <i>Affect inventory?</i> If the return disposition code affects inventory (meaning that the item will be returned into active inventory and update the on-hand quantity in the specified location), the system requires the warehouse and location where the item will be returned. If the disposition code is set up to affect inventory and return to the primary location, the system will check for a primary location in the Item record. If one is available, the system will return the item automatically to this warehouse location. If one is not available or if the disposition code is not set up to receive returns in the primary location, the system will receive the return in the warehouse and location defined in the Return Disposition record; however, you can override these values to return the item to an alternate location. If the item/location does not exist, the system will create a record in the Item/Location table automatically.

Field	Description
	Regardless of whether the return disposition code specifies returning to the primary location, if the system control value Display "No Primary Location" Message in Returns (G46) is selected, and an item does not have a primary location, a pop-up window will display when you select <i>OK</i> to validate your entries and then select <i>OK</i> again to update the record; the pop-up window warns you that a primary location for the item does not exist. Select <i>Cancel</i> to cancel the window and either change the return disposition code, or select <i>OK</i> again to retain the disposition code you have already entered. <i>Time of update:</i> The system does not post updates that include the return disposition code until you receive the return; so if you have create authority only, the operator who performs the receipt or receipt/credit can change the return disposition code at that time. Authority: You can set up authority to process a return for a specific return disposition value at the user or user class level. This can be a blanket authority for all disposition values, or can be specific to individual codes. An error message indicates if you do not have authority to the return disposition code specified: User Does not have authority to return disposition code 4A. Return disposition codes are defined in and validated against the Return Disposition Values table. See Establishing Return Disposition Values (WRDV). Alphanumeric, 2 positions; required.
Warehouse	The code representing the warehouse where the item is or items are being returned. When you are returning a single item, if there is a default warehouse and primary location specified for the item or SKU, the warehouse defaults here, but you can override it. If you are returning a single item, there must already be a record of the item in the warehouse you select. <i>Time of update:</i> The system does not post updates that include the warehouse until you receive the return; so if you have create authority only, the operator who performs the receipt or receipt/credit can change the warehouse at that time. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions; required if the return disposition value affects inventory.
Location	The code representing the location within the warehouse where the item is or items are being returned. If there is a default warehouse and primary location specified for the item or SKU, the location defaults here, but you can override it. <i>Time of update:</i> The system does not post updates that include the location until you receive the return; so if you have create authority only, the operator who performs the receipt or receipt/credit can change the location at that time. Location codes are defined in and validated against the Location table; see Creating and Maintaining Locations (WLOC). Alphanumeric, 7 positions; required if the return disposition value affects inventory.

Field	Description
Refund freight	Indicates whether to refund freight to the customer when crediting the return. Valid values are: <i>Selected</i> = Refund freight. If a Freight override amount is defined for the order and the Calculate freight field for the order ship to is selected, the system advances you to the Enter Freight Refund Window. <i>Unselected</i> (default) = Do not refund freight. This field is enterable only if you have authority to the Receive Return Authorization (A29) secured feature.
Refund add'l chgs (Refund additional charges)	Indicates whether to refund any additional charges on the order to the customer when crediting the return. If there were negative additional charges billed on the order, refunding them results in adding positive addition charges, or decreasing the net amount of any refund. Valid values are: <i>Selected</i> = Refund all additional charges on the order when crediting this return. <i>Unselected</i> (default) = Do not refund additional charges. This field is enterable only if you have authority to receive return authorizations.
Refund handling	Indicates whether to refund handling charges to the customer when crediting the return. Only handling charges related to the item(s) or units of the item(s) being returned are refunded. If the Evaluate Special Handling Charges by Order Line (D67) system control value is <i>selected</i>, handling charges are refunded only if you process a return against all units of the item on the order line. Valid values are: <i>Selected</i> = Refund handling charges. <i>Unselected</i> (default) = Do not refund handling charges. This field is enterable only if you have authority to receive return authorizations.
Refund duty charges	Indicates whether to refund any duty charges for the returned item(s) or units to the customer when crediting the return. Valid values are: <i>Selected</i> (default) = Refund duty charges. <i>Unselected</i> = Do not refund duty charges. This field is enterable only if you have authority to receive return authorizations.

Drop ship orders from multiple vendors: Order Administration does not allow you to create returns for multiple drop ship vendors at the same time. If you complete this screen for a second drop ship vendor on a single return, the system displays the following error message when you select *OK*: Returns against multiple drop ship items/vendors not allowed at the same time.

You must complete your return for the first vendor and create another return for each subsequent vendor on the order.

Processing returns through the integration with Order Orchestration's Drop Ship Manager module is not currently implemented.

Completing the Return/Exchange Item Screen (Creating a Return)

Authority level: The system processes the updates as far as your authority extends. See [Accepting or Rejecting](#) for more information on the updates that take place when you select *Accept* based on your authority level.

No primary location warning: If the item does not have a primary location, the system displays an informational pop-up window when you select *OK* if the [Display "No Primary Location" Message in Returns \(G46\)](#) system control value is selected.

Scan Return ID window: If the [Display Return ID Window \(L99\)](#) system control value is selected, the system advances you to the [Scan Return ID Window](#) after you complete the required information on this screen and select *OK*. This window allows you to assign a return ID to the RA detail line in order to identify the return in an external system.

If you are not processing an exchange at this time, you return to the [Work with Returns for Order Screen](#), where a message indicates how far the return was processed. Additionally, the Quantity shipped, quantity returned, quantity credited, and RA pending fields are updated appropriately.

If you make a mistake: If you have made a mistake on this screen and already selected *OK*, generally you cannot correct the return authorization in the current session. Instead, you must select *Reject* to reject your entries in the current session and reenter the return authorization for the item. See the description of the *Delete* option on the [Work with RA Detail for Item Screen](#) for the one exception.

Processing an exchange? Depending on your authority level and the setting of the [Require Exchange Item at Time of Receipt \(F42\)](#) system control value, you may need to enter an exchange item at this time if you entered an exchange reason code.

- If the [Require Exchange Item at Time of Receipt \(F42\)](#) system control value is selected, and if your authority extends at least to receiving a return authorization, you will need to enter an exchange item at this time.
- If the [Require Exchange Item at Time of Receipt \(F42\)](#) system control value is *unselected*, you will always need to enter an exchange item even if you have authority only to create a return authorization.

See [Enter Exchange Item Screen](#).

Screen Option	Procedure
Create a misship return	Select <i>Create misship return</i> . See Create RA Detail Screen (Processing Misships) .

Enter Freight Refund Window

Use this window to enter the freight amount to refund.

How to display this screen: This window displays if you select the Refund freight field on the [Return/Exchange Item Screen \(Creating a Return\)](#), a [Freight override](#) amount is defined for the order, and the Calculate freight field for the order ship to is selected.

Field	Description
Current freight amount	The current freight amount for the order, based on the Freight override amount on the Display Order Properties Screen . Numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
Freight refund	The amount of freight to refund. Freight tax override: If a Freight tax override is defined for the order, the system uses the Freight tax rate to calculate the amount of tax on freight to refund. Numeric, 7 positions with a 2-place decimal; required.

Instructions:

1. Enter the amount of freight to refund in the Freight refund field.
2. Select **OK**. The system subtracts the freight refund amount from the current freight amount and updates the [Freight override](#) amount on the [Display Order Properties Screen](#) with the new [Freight override](#) amount. If a [Freight tax override](#) is defined for the order, the system uses the [Freight tax rate](#) to determine the new freight tax amount.

Example: You return a line on an order whose freight override amount is \$10.00 and freight tax override amount is \$2.50. The freight tax rate is 25%. At the Enter Freight Refund window, you enter \$4.00 as the freight refund amount. Based on the freight refund amount, the system:

- Refunds \$4.00 freight and \$1.00 freight on tax.
- Updates the freight override amount to \$6.00.
- Updates the freight tax override amount to \$1.50.

Enter Exchange Item Screen

Purpose: Use this screen to enter an exchange item and quantity to replace the returned item.

How to display this screen: This screen displays when you enter an exchange reason code at the [Return/Exchange Item Screen \(Creating a Return\)](#), depending on your level of authority and the setting of the [Require Exchange Item at Time of Receipt \(F42\)](#) system control value.

The Enter Exchange Item window may display instead, depending on whether you are processing a misship return, or the steps you use to create and process the return authorization. However, the window includes all the of same fields as the screen.

For more information: See [Enter Exchange Item Screen](#) in [Working with Return Authorizations: Standard Process](#), for field descriptions and instructions on completing this screen.

Retail pickup or delivery orders: This screen is not available when you are working with a retail pickup or delivery order. See [Maintaining Retail Pickup or Delivery Orders from Order Orchestration](#) for a discussion.

Return/Exchange Item Screen (Create/Return All)

Purpose: Select *Create/Return all* at the [Work with Returns for Order Screen](#) to return all eligible items on the order as far as your authority extends. To be eligible, the item must have been shipped and must not currently have a return authorization completed or in process.

Not all options available: Although you advance to the Return/Exchange Item screen, the same screen you use to create individual return authorizations, you do not have all of the same options when you select *Create/Return all* to return all. For example:

- You cannot enter an exchange reason.
- You cannot specify item quantities.

- The system does not display informational pop-up windows informing you that an item has no primary location or that its primary location is frozen.
- The system does not display the [Scan Return ID Window](#) where you can assign a return ID to each RA detail line.

See [Return/Exchange Item Screen \(Creating a Return\)](#).

Completing returns: There is no equivalent option to complete processing all items on the order. If you select *Create/Return all* to return all but your authority does not extend all the way through receiving and crediting, another operator with greater authority can complete processing the returns by:

- selecting *Complete/process return(s)* for each individual item to complete processing; it is possible to change settings at this time if updates have not already taken place
- using [Receiving Returns \(WRAR\)](#) or [Crediting Returns \(WRAC\)](#) to complete processing.

Retail pickup or delivery orders: This screen is not available when you are working with a retail pickup or delivery order. See [Maintaining Retail Pickup or Delivery Orders from Order Orchestration](#) for a discussion.

How to display this screen: Select *Create/Return all* at the [Work with Returns for Order Screen](#). If there are currently no items that have been shipped but have not yet had return authorizations created, the screen displays an error message.

Field descriptions: See [Return/Exchange Item Screen \(Creating a Return\)](#).

Completing this screen: The system processes the updates as far as your authority extends. See [Accepting or Rejecting](#) for more information on the updates that take place when you select *Accept* based on your authority level.

You return to the [Work with Returns for Order Screen](#), where a message indicates how far the return was processed. Additionally, the Quantity shipped, quantity returned, quantity credited, and RA pending fields are updated appropriately for each item.

If you make a mistake: If you have made a mistake on this screen and already selected *OK*, you generally cannot correct the return authorization in the current session. Instead, you must select *Reject* to reject your entries in the current session and reenter the return authorization for the order. See the description of the *Delete* option on the [Work with RA Detail for Item Screen](#) for the one exception.

Change RA Detail Screen (Complete/Process a Return for an Item)

Purpose: Use this screen to complete or continue processing a return authorization that an operator without full authority created in an earlier session if your authority extends further. For example:

- the return authorization was created, and you have authority to create and receive, or create, receive and credit
- the return authorization was created and received, and you have authority to create, receive and credit

You can also use the [Receiving Returns \(WRAR\)](#) or [Crediting Returns \(WRAC\)](#) menu options to complete processing.

How to display this screen: You can display this screen by selecting *Complete/process return(s)* for a return authorization that is pending but not yet complete at the [Work with Returns for Order Screen](#) or the [Work with RA Detail for Item Screen](#). You can also display this screen by selecting *Accept* at the [Display RA Detail Screen](#).

If multiple returns: If there is more than one return authorization in process for the item you select, you advance to the [Work with RA Detail for Item Screen](#) when you select *Complete/process return(s)* for an item at the [Work with Returns for Order Screen](#).

An error message indicates if there are no returns pending for the item, or if you do not have the authority to continue processing the return.

Field	Description
RA number	A number representing the return authorization. You create a new return authorization header record each time you create a return authorization for an item. One or more items would have the same return authorization number if you selected <i>Create/Return all</i> to return them all at once. This number consists of the order number, ship to number and return authorization number. Order number: numeric, 8 positions; display-only. Ship-to number: numeric, 3 positions; display-only. Return authorization number: numeric, 3 positions; display-only.
Line#	The return authorization line associated with the return. The line number may be greater than 1 if you created the return authorization for all unreturned items on the order by selecting <i>Create/Return all</i>. Numeric, 3 positions; display-only.
Item	A code that identifies the unit of merchandise the customer is returning. Alphanumeric, 12 positions; display-only.
SKU (Stock keeping unit)	The item's unique characteristics, such as its size and color. Alphanumeric, three 4-position fields; display-only.
Order line#	The number of the order line on which the item was ordered. Numeric, 3 positions; display-only.
Invoice#	A unique number to identify the invoice and the line number of the invoice on which the item was shipped and billed. Invoice number: numeric, 7 positions; display-only. Invoice line number: numeric, 3 positions; display-only.
Refund freight	Indicates whether to refund freight to the customer when crediting the return. Valid values are: <i>Selected</i> = Refund freight. If a Freight override amount is defined for the order, the system advances you to the Enter Freight Refund Window. <i>Unselected</i> (default) = Do not refund freight. This field is enterable only if you have authority to credit return authorizations.
Refund add'l chgs (Refund additional charges)	Indicates whether to refund any additional charges on the order to the customer when crediting the return. If there were negative additional charges billed on the order, refunding them results in adding positive addition charges, or decreasing the net amount of any refund. Valid values are: <i>Selected</i> = Refund all additional charges on the order when crediting this return. <i>Unselected</i> (default) = Do not refund additional charges. This field is enterable only if you have authority to credit return authorizations.

Field	Description
Refund handling	Indicates whether to refund handling charges to the customer when crediting the return. Only handling charges related to the item or units of the item being returned are refunded. If the Evaluate Special Handling Charges by Order Line (D67) system control value is <i>selected</i>, handling charges are refunded only if you process a return against all units of the item on the order line. Valid values are: <i>Selected</i> = Refund handling charges. <i>Unselected</i> (default) = Do not refund handling charges. This field is enterable only if you have authority to credit return authorizations.
Refund duty charges	Indicates whether to refund any duty charges for the returned item or units to the customer when crediting the return. Valid values are: <i>Selected</i> (default) = Refund duty charges. <i>Unselected</i> = Do not refund duty charges. This field is enterable only if you have authority to credit return authorizations.
Qty to return (Quantity to return)	Enter the quantity of the item you are returning or exchanging to the same location and with the same return or exchange reason code. This field is: - required if the return authorization has been created only and you are receiving, or receiving and crediting, at this time, as this information is required to process updates. - display-only if the return authorization has been created and received, and you are crediting at this time, as the related updates have already been processed. Numeric, 5 positions; required or display-only.
Qty returned (Quantity returned)	The quantity of the item that has been received into the warehouse on this return authorization only. Numeric, 3 positions; display-only.
Qty credited (Quantity credited)	The quantity of the item that has been credited on this return authorization only. This number should always be zero. Numeric, 3 positions; display-only.
Return reason	The reason that the customer is returning the item. A return reason code indicates whether returned items are defective, and are used for reporting purposes. You must enter either a return reason code or an exchange reason code to process a return authorization. You cannot have more than one return in process for an item against the same location. This field is: - required if you do not enter an exchange reason code, the return authorization has been created only, and you are receiving, or receiving and crediting, at this time, as this information is required to process updates. - display-only if the return authorization has been created and received, and you are crediting at this time, as the related updates have already been processed. Return reason codes are defined in and validated against the Return Reason table. See Establishing Return Reason Codes (WRTTR). Numeric, 3 positions; required or display-only.

Field	Description
Exchange reason code	The reason that the customer is exchanging the item. An exchange reason code indicates whether returned items are defective, and are used for reporting purposes. You must enter either a return reason code or an exchange reason code to process a return authorization. If you enter an exchange reason code, you advance automatically to the Enter Exchange Item Screen if this information was not already completed in an earlier session. You cannot have more than one return or exchange in process for an item against the same location. This field is: • required if you do not enter a return reason code, the return authorization has been created only, and you are receiving, or receiving and crediting, at this time, as this information is required to process updates. • display-only if the return authorization has been created and received, and you are crediting at this time, as the related updates have already been processed. <i>Retail pickup or delivery orders:</i> This field is not available when you are working with a retail pickup or delivery order. See Maintaining Retail Pickup or Delivery Orders from Order Orchestration for a discussion. Exchange reason codes are defined in and validated against the Exchange Reason table. See Establishing Exchange Reason Codes (WEXR). Numeric, 3 positions; required or display-only.
Return disposition	A code that identifies how a returned item will be handled by the system, in terms of whether the return updates inventory and the warehouse and location to which the item will be returned. This field is: • required if the return authorization has been created only, and you are receiving, or receiving and crediting, at this time, as this information is required to process updates. • display-only if the return authorization has been created and received, and you are crediting at this time, as the related updates have already been processed Regardless of whether the return disposition code specifies returning to the primary location, if the system control value Display "No Primary Location" Message in Returns (G46) is <i>selected</i>, and an item does not have a primary location, a pop-up window will display when you select <i>OK</i> to update the record; the pop-up window warns you that a primary location for the item does not exist. Select <i>Cancel</i> to cancel the window. If you are receiving the item, or receiving and crediting, you can change the return disposition code if you wish. Otherwise, select <i>OK</i> again to retain the code already entered. See Return/Exchange Item Screen (Creating a Return). Return disposition codes are defined in and validated against the Return Disposition Values table. See Establishing Return Disposition Values (WRDV). Alphanumeric, 2 positions; required or display-only.

Field	Description
Warehouse	The code representing the warehouse where the item is being returned. If there is a default warehouse and primary location specified for the item or SKU, the warehouse defaults here, but you can override it. There must already be a record of the item in the warehouse you select. This field is: - required if the return disposition value affects inventory, if the return authorization has been created only, and you are receiving, or receiving and crediting, at this time, as this information is required to process updates. - display-only if the return authorization has been created and received, and you are crediting at this time, as the related updates have already been processed. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions; required or display-only.
Location	The code representing the location within the warehouse where the item is being returned. If there is a default warehouse and primary location specified for the item or SKU, the location defaults here, but you can override it. This field is: - required if the return disposition value affects inventory, if the return authorization has been created only, and you are receiving, or receiving and crediting, at this time, as this information is required to process updates. - display-only if the return authorization has been created and received, and you are crediting at this time, as the related updates have already been processed. Location codes are defined in and validated against the Location table; see Creating and Maintaining Locations (WLOC). Alphanumeric, 7 positions; required or display-only.

Completing this screen:

- If the item does not have a primary location, the system displays an informational pop-up window when you select **OK** if the [Display "No Primary Location" Message in Returns \(G46\)](#) system control value is *selected*.
- The system processes the updates as far as your authority extends. See [Accepting or Rejecting](#) for more information on the updates that take place when you select **Accept** based on your authority level.
- If you are not processing an exchange at this time, you return to the [Work with Returns for Order Screen](#), where a message indicates how far the return was processed. Additionally, the Quantity shipped, quantity returned, quantity credited, and RA pending fields are updated appropriately.

If you make a mistake: If you have made a mistake on this screen and already selected **OK**, you cannot correct the return authorization in the current session. Instead, you must select **Reject** to reject your entries in the current session and reenter the return authorization for the item.

Display RA Detail Screen

Purpose: Use this screen to review a return authorization that is in process for an item. From this screen, you can also:

- Display the [RA Exchange Item Window](#), which includes information on the exchange item for the return, if any.
- Advance to the [Change RA Detail Screen \(Complete/Process a Return for an Item\)](#), where you can continue processing the return authorization.

How to display this screen:

- Select *Display* for an item at the [Work with Returns for Order Screen](#) (streamlined process)
- Select *Display* for a return authorization at the [Work with Return Authorization Detail Screen](#) (standard process)
- Select *Display* for an item at the [Second Process RA Credits Screen](#) (Crediting Returns (WRAC))

If multiple returns: If there is more than one return authorization in process for the item you select, you advance to the [Work with RA Detail for Item Screen](#) instead.

Field descriptions: See [Return/Exchange Item Screen \(Creating a Return\)](#).

RA Exchange Item Window

Purpose: Use this window to review information on the item to ship in exchange for a returned item.

How to display this window: Select *Exchange Info* at the [Display RA Detail Screen](#). If there is not an exchange item to be shipped for the return, the screen displays an error message.

Field descriptions: See [Enter Exchange Item Screen](#).

Work with RA Detail for Item Screen

Purpose: Use this screen to review return authorizations for an item if there is more than one authorization in process, or to delete a return authorization which has not yet been received and credited.

How to display this screen: Select *Display* or *Complete/process return(s)* for an item at the [Work with Returns for Order Screen](#) if there is more than one authorization in process.

Field	Description
Date created	The date the return authorization was created. Numeric, 6 positions (in user date format); display-only.

Screen Option	Procedure
Delete a return authorization	Select <i>Delete</i> for a return authorization to delete it.
Review a return authorization in process for the item	Select <i>Display</i> for a return authorization to advance to the Display RA Detail Screen .
Continue processing a return authorization for the item	Select <i>Complete/process return</i> for a return authorization to advance to the Change RA Detail Screen (Complete/Process a Return for an Item) .

 Note:

You can delete a return authorization record only you have the proper authority, as controlled by the [Delete Return Authorizations \(B03\)](#) secured feature, and if the return has not yet been received. However, if you have received the return and not yet accepted your entries, you can reject the entries in the current session, then reselect the return authorization and delete the item.

Accepting or Rejecting

- [Accepting Your Entries](#)
- [Rejecting Your Entries](#)

Pick slip preparation: When you accept or reject a return authorization, the system determines if the order qualifies for pick slip preparation and applies it to the order. If you add an exchange item to the order, the system performs pick slip preparation for the exchange item when you receive the return authorization. See [Preparing Orders for Pick Slip Generation](#).

Accepting Your Entries

Select *Accept* to accept all of your entries during the current session while *Working with Return Authorizations: Streamlined Process*. Depending on your authority, the updates made at this point are as follows:

- [Create a Return Authorization](#)
- [Receive a Return Authorization](#)
- [Credit a Return Authorization](#)

Create a Return Authorization

A message is written to order history:

Order was maintained through R/A.

Note that the dollar amount that displays with this message refers to the entire order total, not just the dollar value of any return.

If the return authorization was created through the e-commerce interface: You can enable your web customers to create return authorizations on the storefront. When a return

authorization is created through this method, a message such as the following is written to order history:

```
7/14/06 N RA 5525-1-1 created from the web.
```

Note that this message does not include a dollar amount or user ID.

You can review these messages by selecting *Messages* in standard order inquiry to advance to the [Display Order History Screen](#). These messages are also available by selecting *Messages* in streamlined order inquiry.

Return authorization download triggers: If the [Create Return Download Triggers \(K28\)](#) system control value is *selected*, the system creates a return authorization download (RAD) trigger when you create, change, or delete a return authorization line, based on the trigger rules defined for the Return Authorization Download (RETURN_OUT) integration layer job. The RETURN_OUT integration layer job monitors for return authorization download triggers and generates a Return Authorization Outbound XML Message (CWReturnRAOut) to send the return authorization information to a remote system.

Receive a Return Authorization

Receipts are processed through the ORDR_ASYNC job. Updates include:

- The inventory for the item, including increasing on-hand in the item location and item warehouse, and adding an inventory transaction history record
- the order, including the order detail and order line history
- for an exchange, adds the exchange item to the order
- the return authorization header and detail

Credit a Return Authorization

Credits are processed through the ORDR_ASYNC and BILL_ASYNC jobs, which update:

- the order, including order history, and creating the credit invoice and refund, if appropriate
- the return reason or exchange reason history for the offer
- the return authorization header, deleting the detail record.



Note:

Refunds can be either positive (you owe the customer money) or negative (the customer owes you money).

Select Active Pay Method screen: The system displays the Select Active Pay Method screen when you accept the return authorization if a deactivated payment method exists on the order. Use this screen to select which active payment method will receive the credit.

Rejecting Your Entries

Select *Reject* to reject all of your entries during the current session. Any updates to the return authorization tables will be undone, and additional updates will not take place.

To undo an error you made while processing a return authorization against any of items during the current session, you must reject all entries. You cannot undo an individual return authorization.

Issuing Refunds

Topics in this part:

- *Introducing the Refund Process* presents an overview of the refund process, including a discussion of situations that can cause a refund, refund types and reason codes.
- *Printing and Interpreting Refund Due Lists (MRDU)* explains how to print the Refund Due List and use this report to verify and document the changes you make to refunds prior to processing.
- *Working with Refunds, Writeoffs and Balances Due (WREF)* shows you how to research refunds, change a refund's type, place a refund on hold indefinitely or until a specific date, release a refund from hold, or change the refund's status so it will be canceled or written off when you next process refunds.
- *Processing Refunds (MREF)* shows you how to print and reprint refund checks and process credits and write-offs.
- *Printing the Processed Refund Register (PPRR)* explains how to generate the Processed Refund Register.
- *Processing Refunds by Order Number (MRFO)* explains how to generate refunds for selected orders only.

Introducing the Refund Process

Purpose: You can use the system's refund functions to review and manage:

- refunds you owe your customers
- balances your customers owe you.

With this option, you can issue refund checks and credits or write refunds off. You can also void and reconcile refund checks, review refund check detail, and purge refund check records.

Working with the Refund Process

The system creates a refund any time there is a difference between the order total and the payment.

Refunds occur when:

- The customer returns an item.
- You cancel all or part of a prepaid order at the customer's request.
- You cancel all or part of a prepaid order because the merchandise is soldout.
- The system cancels all or part of a prepaid order through the Automatic Backorder Cancellation program.
- You cancel part of an order when the customer has already paid the entire freight amount.
- The customer's initial payment exceeds the total cost of the order (overpayment).
- The customer pays less than the order total (underpayment).

! Important:

The system will never generate a refund for an order if you cancel an item on the order with a cancel reason whose [Generate refund?](#) field is set to 3 (do not generate a refund).

Refund types: There are several types of refunds:

- *Checks* = A refund check can be cut for the exact amount of the refund.
- *Credit card credits* = In addition to crediting the customer's credit card account, you can issue a credit card credit acknowledgment. See [Processing Refunds \(MREF\)](#).
- *Stored value card credits* = The system generates a new stored value card for the refund amount; the customer can use this stored value card credit towards a new order; see [Generating Stored Value Card Refunds](#) for more information on when the system creates a stored value card credit.

The system generates a refund type that corresponds to the way the customer paid for the merchandise. For example, if the customer paid using a Visa card, the system generates a credit card credit. However, you can control how the money is refunded by defining an alternative refund type in the Pay Type table. You can also change the refund type by defining an alternate refund category. See [How Pay Type Determines Refund Type](#).

Functions that produce refunds: Refunds are created from:

- Order Entry (or Order Async): overpayment due to a soldout item or an initial amount more than what is owed (overpayment) or less than what is owed (underpayment)
- Order Maintenance (Returns or Billing cancellations)
- Return Authorization Process (Credit returns)
- Billing (Automatic Backorder Cancellation)
- Auto Soldouts (Auto Soldouts program)

! Important:

The system will never generate a refund for an order if you cancel an item on the order with a cancel reason whose [Generate refund?](#) field is set to 3.

Refund reason codes: The system assigns each refund a reason code. These codes are:

Code	Description
A	<i>Auto cancel backorders</i> This reason applies when a backorder item exists on an order and you process automatic backorder cancellations.
B	<i>Balance due</i> This reason applies when an order has an unpaid balance.
O	<i>Overpayment</i> This reason applies when a customer pays more than the order total, when the customer cancels a prepaid item or order, or when an item on a prepaid order is sold out.

Code	Description
R	<i>Return</i> This reason applies when a customer returns one or more items using a return authorization.
S	<i>Soldout</i> This reason applies when a soldout item exists on an order and you process automatic soldout cancellations.

Why do refunds go on hold? The system can hold a refund automatically or you can place them on hold.

Automatic holds occur when:

- the refund check amount is less than the minimum or more than the maximum amount specified in the Pay Type table; see [Working with Pay Types \(WPAY\)](#).
- the refund release days have not elapsed (this is used to hold refunds for an order paid by check until the check has cleared)
- the order that includes the refund is on hold
- the cancel reason you used to cancel any item on the order had the [Generate refund?](#) field set to 2
- the refund is associated with [Credit Card Net Exchange Billing](#)

You can also place a refund on hold manually through [Working with Refunds, Writeoffs and Balances Due \(WREF\)](#) (for example, if you suspect a fraudulent customer).

Can I release held refunds? You can release refunds that are on hold. Releasing refunds from hold, however, does not mean that they will be processed if the order is on hold.

The system releases the refund automatically when the order hold is released or the refund release days pass. However, if the refund is on hold because it is more than the maximum for the pay type or because you put it on hold manually, you must release it through [Working with Refunds, Writeoffs and Balances Due \(WREF\)](#).

Writeoffs: When the amount of a refund is less than the minimum defined for the pay type, the system marks the refund to be written off. The refund will be written off the next time you process refunds unless you change the status (for example, to generate a refund check because the customer requests it).

You can also change the status of a refund to “writeoff pending” through [Working with Refunds, Writeoffs and Balances Due \(WREF\)](#) regardless of the refund amount (for example, if you have tried and failed to collect a balance due).

What happens to writeoff amounts? When you write off a refund amount the system updates the customer record with the writeoff amount. The writeoff balance accumulates for the customer. You can apply the balance to a new order as a payment if it is a positive amount or as an additional charge if it is a negative amount.

Can I cancel a refund? You can cancel a refund through [Working with Refunds, Writeoffs and Balances Due \(WREF\)](#) if the refund was created by mistake or the customer is a fraud.

Guidelines for issuing refunds: Follow the guidelines below when you are working with Refunds.

1. Print the [Refund Due List](#)
2. Review the refunds that are ready for processing.

3. Check the order status and determine which held orders you want to release.
4. Determine which refunds you want to release from hold.
5. Use the [Work with Refunds Screen](#) to research refunds, to release, hold, cancel or writeoff a refund, or to change the type of refund to issue.
6. Reprint the [Refund Due List](#) so that you have a record of the changes you make to the refunds and to verify that you changed the refunds correctly.
7. Process refunds and writeoffs. See [Processing Refunds \(MREF\)](#).

What if I have a printing problem? If you have a problem printing the refund checks, you can reprint them with the [Reprint Refunds Screen \(MREP\)](#).

Why is each refund associated with a bank? Whenever the system creates a refund record, it associates the refund with a bank code. The system determines the bank code as follows:

- When you created the source code used on the order header, you specified a division.
- When you created the division associated with the source code, you specified a bank. The system uses this bank code.

The system uses the bank code in one or more ways, depending on whether you process orders in multiple currencies (determined by the [Multi Currency by Offer \(E03\)](#) system control value).

For all orders: Even if you process orders in only one currency, you might use more than one bank for deposits and refunds. When you process refund checks, the system determines the next sequential check number to use by checking the Bank table.

For orders in foreign currency: If you process an order in a foreign currency, you generate the refund in this currency as well. The system requires additional setup and validation when the [Multi Currency by Offer \(E03\)](#) system control value is *selected*; among other things, each currency is associated in Order Administration with a unique bank. The bank code that appears on the [Work with Refunds Screen](#) indicates the currency that the customer used to pay for the order. Because the system requires a bank code when you process refunds, you can generate refunds in only one currency at a time. If you specify a dollar limit to generate for one of your refund types, the system interprets this limit in your local currency, but generates the refund in the customer's currency.

Suppressing refunds: You can suppress refund processing:

- For orders you receive through the *Generic Order Interface (Order API)*. See *Suppressing Deposits and Refunds* for an overview.
- For returns you receive through the *Inbound Return API*. See *Suppressing Refunds* for an overview.

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

In this situation, the refund is generated in a cancel pending status.

Working with Catalog Requests

Catalog requests are created interactively using the Request Catalog Request option under the Customer in Modern View (and provide a link to that section in the MV online hlep) and through the ecommerce catalog request web service (and provide a link to that) and the catalog request file upload option.

In this part:

- [Working with the Catalog Request Interface \(WCRU\)](#) discusses processing catalog requests you receive through an interface with Order Administration.
- [Catalog Request History Options](#) describes [Purge Catalog Request History \(PCRH\)](#).

Catalog Request History Options

Purpose: There are two menu options related to the Catalog Request History table. This table provides an historical record of catalog requests within your company, even after you have purged outdated catalog requests. You can include this information in reports, such as the Campaign Performance Report; see [Print Campaign Performance Reports \(PCPR\)](#) for more information.

In this topic:

- [Purge Catalog Request History \(PCRH\)](#)

Managing Soldouts and Backorders

In this part:

- [Working with Soldout Controls \(WSLD\)](#) shows you how to create, change, delete, and display soldout controls in the Soldout Control table.
- [Processing Auto Soldout Cancellations \(MASO\)](#) presents the screen you use to cancel soldout items from those orders that contain them.
- [Generating Soldout Notifications \(MSON\)](#) shows you how to use the Print Soldout Notifications screen to produce soldout notifications that you send to your customers.
- [Purchase Order Layering and Backorder Notifications](#) shows you how to use the Generate Backorder Cards function to print backorder notification cards and the Backorder Cancellation Register.
- [Working with Held Detail Lines \(WOHD\)](#) shows you how to use the Work with Order Hold Detail screen. You use this screen to work with items that were held because they were coordinate grouped with items canceled through Process Auto Soldouts.
- [Working with Backorders Pending Cancellation \(WBPC\)](#) shows you how to use this menu option to continue to work with backorders once you have generated a second notice if the FTC--second notice output system control value is set to *FILE* or *FILE/PRINT*.
- [Processing Item Substitutions \(PSUB\)](#) shows you how to cancel all open, unreserved order lines for a particular item and add a substitute item to each order.

Purchase Order Layering and Backorder Notifications

Purpose: Use the Generate Backorder Notifications function to generate notices informing customers when backordered items are expected to ship. You must work within the guidelines of the Federal Trade Commission (FTC) on backorder notifications; for this reason, backorder cards are also called “FTC cards.”

This function also produces the [Backorder Cancellation Register](#), which lists orders containing backordered items that are due for cancellation. You have the option of canceling the items through order maintenance or contacting the customers to suggest alternate items.

If the [FTC--Second Notice Output \(E68\)](#) system control value is set to *FILE* or *FILE/PRINT*, and the [FTC -- Action after Second Notification \(C70\)](#) system control value is set to *CANCEL*, you can use [Working with Backorders Pending Cancellation \(WBPC\)](#) to continue to work with orders once you have generated second notices.

Future orders: Future orders are not included in backorder processing until their arrival date is within the [Reservation Lead Days \(B27\)](#) system control value.

Quotes: Quotes are not included in backorder processing until they are converted to orders; see [Entering Pre-Order Quotes](#) for an overview.

Email notifications: The system sends an email notice or the *Outbound Email XML Message (CWEmailOut)* rather than generating a document for printing in certain situations. For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1). Also see [When Does the System Generate an Email Notification?](#)

Email template: You can use the [Working with Entities \(WENT\)](#) menu option to create an entity-level email template, and the [Working with E-Mail Notification Templates \(WENT\)](#) menu option to create a default company-level backorder notification template. The template specifies the text to print above and below the standard backorder information. The template also controls whether to generate an actual email or the *Outbound Email XML Message (CWEmailOut)*.

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

Generate notice if purchase order changes? The [FTC - Suppress Backorder Notice for Due Date Changes \(L65\)](#) system control value controls whether to generate a backorder notice if you change the due date for the next expected purchase order to a later date, or cancel the purchase order.

Sample backorder email notification: See [Backorder Notification Email Sample and Contents](#).

 Important:

The outbound XML version for the EMAIL_OUT process in [Working with Integration Layer Processes \(IJCT\)](#) must be set to 2.0 in order to generate backorder notices in email or *Outbound Email XML Message (CWEmailOut)* format.

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

Save in email repository? The [Write Outbound Email to Email Repository \(H99\)](#) system control value controls whether email notifications are stored in correspondence history. See this system control value for more information on identifying and reviewing outbound emails for a customer.

 Note:

You should run [Purchase Order Layering](#) before generating backorder notices to update the expected delivery dates of backordered items.

Drop ship items, including brokered items: The [Assign Drop Ship Expected Ship Date \(I59\)](#) system control value controls whether the expected ship date is displayed or printed for drop ship items. See that system control value for more information.

Order Orchestration: If an order line is assigned to Order Orchestration for fulfillment, the [Generate Backorder Notices \(GBOC\)](#) option does not generate backorder notices for the order line while the Order Orchestration request is in process; however, if Order Orchestration

cannot fulfill the order or if you cancel the Order Orchestration request, the order line returns to standard backorder processing and is eligible for backorder notice generation. See the [Order Orchestration Integration](#) for background.

See:

- [Generate Backorder Notices \(GBOC\)](#)
- [Backorder Card](#)
- [Backorder Cancellation Register](#)
- [Purchase Order Layering](#)

System Control Values Related to Backorder Notices and Purchase Order Layering

Purpose: The following values control [Generate Backorder Notices \(GBOC\)](#) and [Purchase Order Layering](#). See [Purchase Order Layering and Backorder Notifications](#).

Description	Valid Values	Summary
Backorder Card Print Program (D04)	program name (the standard program is BOCARDS)	The print program that the system uses to generate backorder cards.
Days after 2nd Backorder Notification to Cancel Order (D07)	numeric value	Number of days to allow before including the item on the Backorder Cancellation Register. The system uses this value only if you entered <i>Cancel</i> in the FTC -- Action after Second Notification (C70) system control value.
FTC -- # of Days to Add for Special Handling (C67)	numeric value	Number of days to add to the expected receipt date to perform special handling before shipping a backordered item.
FTC -- # of Days to Add for Drop Ships (C68)	numeric value	Number of days to add to the expected receipt date for shipping backordered drop ship items, including brokered items. A drop ship item is an item that your vendor ships for you, rather than shipping it from your own warehouse. The calculation is for the expected ship date = the current date + FTC -- # of Days to Add for Drop Ships (C68) + the Lead days for the vendor item. The Assign Drop Ship Expected Ship Date (I59) system control value controls whether the expected ship date is displayed for drop ship items. See that system control value for more information.
FTC -- Action after Second Notification (C70)	CANCEL, CONTINUE, STOP	The action for the system to take the next time you generate backorder notices after you have sent the second notification to a customer.
FTC -- # of Days for Items without Expected Ship Date (C71)	numeric value	The number of days for the system to add to the expected arrival date for items with no open purchase orders.

Description	Valid Values	Summary
Number of Days to Delay Initial Backorder Notice (D89)	numeric value	The number of days to delay sending a backorder notice for order types that receive immediate backorder notices (defined in the Order Type table; see Establishing Order Types (WOTY)). If an item is backordered, but you will be able to ship it before this number of days passes, the system does not generate a backorder notice.
FTC--Number of Days Prior to Next Backorder Date to Generate Second Notice (E67)	numeric value	The number of days before the second backorder notice is due to generate the notice, or include the order in a report listing orders flagged for cancellation. The system uses this value if the action after second notification is CANCEL. You can use this system control value either to generate backorder notices in advance, or take corrective action to avoid cancelling backordered items.
FTC--Second Notice Output (E68)	FILE, PRINT, FILE/PRINT	The destination for second notices: written to the Backorder Pending Cancellation table only, generated and not written to the file, or generated and written to the file. If you set this field to FILE or FILE/PRINT, you can use Working with Backorders Pending Cancellation (WBPC) to continue to work with the orders.
Number of Days to Add for Accepted Delays (E69)	numeric value	The number of days to add to the backorder date when a customer accepts the delay following the second notice. This option is available through Working with Backorders Pending Cancellation (WBPC) .
Unconditional Suppression of Backorder Card (F19)	Selected or Unselected	Indicates whether items or SKUs whose Suppress backorder card field is selected will appear on first backorder notices, or never appear. Items/SKUs set to suppress never trigger a backorder notice on their own, and are included on a first backorder notice only if an unsuppressed item is backordered. You would typically choose to suppress promotional items, free gifts, catalogs, etc. from backorder notification. Such items are never eligible to be canceled through Working with Backorders Pending Cancellation (WBPC) .

Description	Valid Values	Summary
Backorder Notification E-Mail Program (G95)	program name (the standard program is <i>BONOTF</i>)	Indicates the program to use when sending an email backorder notification to a customer. See When Does the System Generate an Email Notification? for an overview of how the system determines whether to send an email notification or to generate a document for printing, and for information on entering the text to appear in the email.
Assign Drop Ship Expected Ship Date (I59)	Selected or Unselected	Indicates whether to calculate and display (or print) the expected ship dates for drop ship items, including brokered items. The expected ship dates for drop ship items are calculated as follows: the expected ship date = the current date + FTC -- # of Days to Add for Drop Ships (C68) + the Lead days for the vendor item
FTC - Suppress Backorder Notice for Due Date Changes (L65)	Selected or Unselected	Indicates whether to generate a backorder notice for an order line if the due date for the next expected purchase order changes to a later date, or if the purchase order is canceled.

Processing and Purging Subscriptions

In this part:

- [Generating the Subscription Extract Table \(WGSE\)](#) describes the process of identifying the issue number of the subscriptions you want to send and creating a file of customers who should receive this issue.
- [Purging Subscriptions \(MPCS\)](#) describes how to purge closed (expired) or canceled subscriptions from the Customer Subscription table.

Memberships

In this part:

- [Membership Overview](#) provides a high-level overview of creating membership programs, assigning them to customers, and generating membership orders.
- [Working with Membership Types \(WWMT\)](#) describes the menu option you use to set up membership types for tracking, sorting, and revision control.
- [Working with Membership Programs \(WWMP\)](#) describes the menu option you use to set up membership programs in which you can enroll customers.
- [Working with Customer Memberships \(WWCM\)](#) describes the menu option you use to work with customer memberships, including creating, changing, working with included items, and changing status.

- [Generating Membership Orders \(EGMO\)](#) describes the menu options you use to create orders for customer memberships.
- [Printing the Expected Membership Orders Report \(PEMO\)](#) describes the menu option you use to generate this report and provides a sample.
- [Update Customer Memberships \(MMCM\)](#) describes how to update the source code and replace an item on existing customer memberships and, optionally, membership programs.

Membership Overview

Overview: There are two types of memberships:

1. **Standard memberships:** Programs you can use to generate regular periodic orders for a customer. For example, you might set up a membership program to create an order for a food or beverage item each month. Once you generate an order through a membership, you can ship and bill it like any other order.
2. **Loyalty memberships:** Programs that provide a discount and/or other rewards to customers based on their order history. The background jobs automatically create or deactivate loyalty memberships for customers based on order activity. For example, you could offer customers a 5% discount and free shipping once their total merchandise dollars to date exceeds \$500.

Creating standard memberships: You can create standard memberships for customers in order entry, on the web storefront, or through a separate menu option.

Standard memberships can be open-ended or can have a specified number of shipments. They can include the same items each time you generate an order or you can rotate the items. Standard memberships can also include a discount percentage that applies to any order the customer places; or you can also create discount-only standard memberships that do not generate orders.

E-commerce interface (order API): You can sell standard memberships on orders for web customers if your web storefront supports it. When a customer orders a membership item on the web storefront, Order Administration passes a status message to the storefront indicating that the item represents a membership, rather than a regular inventoried item with a reservation or backorder status.

Note:

- If you sell a membership item on the web storefront, it must have the same name as the membership program itself. See [Setup for Standard Membership Programs](#).
- If the order detail line creating the membership is in error status, the system still creates the customer membership provided there is sufficient data available to create it; however, if you later delete the order detail line or reject the order or order batch, the system deletes the customer membership.
- When a customer purchases a membership item and the payment information is passed separately, the system does not create the customer membership or apply any membership discount until receiving the payment message. In this situation, the system initially applies an error to the order: `Missing Membership`.

Loyalty memberships: You cannot sell or manually create loyalty memberships; loyalty membership activation occurs only when the `ORDR_ASYNC` or job updates the customer's total merchandise sales or order dollars, and determines that the customer now qualifies for a new loyalty membership program based on customer class or sales, order, or external sales dollars.

When you set up loyalty membership programs, you specify whether to base eligibility on sales or order dollars and whether to subtract activity such as cancellations, soldouts, and returns from the total dollar value required to qualify. You can set up a series of graduated loyalty programs with increasing discounts and rewards. For example, you could have BRONZE, SILVER, AND GOLD loyalty programs, with the system automatically promoting customers from one program to the next as their order history qualifies them.

In this topic:

- [Examples of Standard Membership Programs](#)
- [Setup for Standard Membership Programs](#)
- [Order Entry](#)
- [Work with Customer Memberships](#)
- [Generating Orders](#)
- [Expected Membership Orders Report](#)
- [About Discount Memberships](#)
- [Loyalty Memberships](#)
- [Updating Memberships](#)

Examples of Standard Membership Programs

Purpose: Some sample standard membership programs are described below.

Example 1: A year of shipments. In this example, the membership includes a different order each month for a year, such as “fruit of the month” or “coffee of the month.” The items included in each order, the sequence in which they are shipped, and the pricing are all fixed at the start of the membership, and the customer does not have the option to change or add items. When the predefined number of orders has been generated, the membership closes automatically.

Example 2: Open-ended. The customer chooses the item or items, such as coffee, food items, or other consumables, to receive. Additionally, the customer specifies how frequently the orders should be generated; some prefer monthly shipments, while others receive shipments every two or three weeks. You might include an initial free gift with the first order. Also, the customer can request an additional item to be included in selected rotations, such as every other shipment. The customer pays the current offer price for included items. You leave this type of membership open, and continue generating new orders, until the customer advises you to close the membership.

Example 3: Discount membership. The customer purchases a discount “card” which is good for one year. Any time the customer places an order, this discount applies to the merchandise total.

Setup for Standard Membership Programs

Purpose: The setup required for standard memberships consists of:

Membership type: Before you set up a membership program, you must first set up one or more membership types. Membership types are codes that you use to group membership programs. Also, the membership type controls whether you can change any of the settings that default from the membership program, such as the items included in shipments or the intervals at which you generate orders, when you create a membership for a customer.

Additionally, at the time you generate membership orders, you can select specific membership types. For example, if you have just received a shipment of an item you include in a certain type of membership, you can choose to generate that type of membership order only.

For more information: See [Working with Membership Types \(WWMT\)](#).

Membership program: You set up membership programs to identify the settings that default when you create individual customer memberships. These settings include:

- The interval at which you generate orders. You can choose a specific day of the month, or a number of days between orders. If you specify the number of days between orders, you can also indicate whether to delay the initial shipment, or whether the membership should be eligible for order generation immediately.
- First and last dates when you can create new customer memberships.
- Discount percentage, if any, and the number of months that the discount will be effective.
- Source code, ship via, and order type to default to generated membership orders.
- Items to include on generated membership orders, including:
 - the quantity to include on each generated order
 - the rotation in which to include the item, if you use varying rotations
 - the total number of times to include the item on generated orders
 - price override, if any

You can override the settings from the membership program for an individual customer membership if the membership type allows it.

For more information: See [Working with Membership Programs \(WWMP\)](#).

Membership Item: In order to create new customer memberships in order entry, you need to set up one or more membership items. When you enter a membership item in order entry, the system displays a pop-up window for you to specify the membership program in which the customer wants to enroll.

- *Identify a membership item:* You identify an item as a membership item by *selecting* the [Membership](#) field. You should also *select* the Non-inventory field.
- *Simplify order entry:* You can use the same code to identify both the membership item and the membership program. For example, you could create both with a code of *MEMB01*. When you enter the membership item *MEMB01* in order entry, the *MEMB01* membership program ID defaults. **Note:** If you process orders through the web storefront, the membership item and program ID *must* be the same.
- *Price of a membership item:* If you plan to charge for creating the membership program in order entry, you need to set up an item/offer for a membership item. If you do not plan to charge for the customer membership itself, the order entry operator will need authority to override the price and add the membership item at no charge.
- *Membership item price and discount:* If you charge for the customer membership, and if the membership includes a discount, you must set the membership item to be non-discountable (*select* to the Discountable field). Otherwise, the price of the membership itself will be discounted. For example, you offer a membership that carries a 10% discount on all orders for one year. The price of the membership is \$10.00. You must *select* the Discountable field, or the price of the membership itself will be discounted to \$9.00.
- *Initial shipment:* In order to generate an initial shipment to the customer at the start of a discount-only membership, you should set up the item(s) using the Accompanying Item option at the [Work with Item Offers Screen](#). If you attempt to generate the initial shipment through standard membership order generation, the membership's status will change to *Complete* after you generate the order, and the discount will no longer apply.

- **Soldout flag:** If you define a soldout control code for the membership item, the system will not generate a customer membership once the membership item is soldout. See [Soldout Calculation](#) for more information on when the system determines to sell out an item.

System control values:

- **Display First Membership Order Total (G14):** If this system control value is *selected*, the system displays a window providing the estimated dollar total for the first membership order when you accept an order creating a membership.
- **Write Order Messages for Membership Rotation (K04):** If this system control value is *selected*, the system writes an order message on the order that originates the customer membership, and on generated orders. The message indicates the name of the membership program and the Next release date, and is flagged to print on the pick slip.

Order Entry

Purpose: An overview of creating standard customer memberships in order entry is provided below.

Quotes: You can also create a standard customer membership in quote entry. The system performs the same updates as it would when you create a customer membership in order entry; however, the system creates the customer membership in an inactive status and does not update the status to active until you convert the quote to an order. See [Entering Customer Memberships in Quote Entry](#) for more information.

Entering a membership item: You can sell a standard membership through any order. The membership does not need to be the only item on the order, although it can be.

When you enter the membership item, a pop-up window opens. From this window, you can specify the membership program for the customer or confirm the program that defaulted based on the membership item you entered. You can advance to subsequent screens where you can override information that defaults from the current order, such as payment method. You can also override information that defaults from the membership program if the membership type allows it.

Once you have entered the membership, you can still make changes to the membership, or cancel it, by selecting Customer Memberships at the [Display More Options Screen](#) (available by selecting *Options*). You can also cancel a membership in order maintenance by canceling the membership item; see [Canceling a Membership Item](#) for more information.

**Note:**

You cannot create a membership in Contact Center Order Entry.

Soldout membership: If the membership item is soldout, the system updates the status of the order line to S (Soldout) and does not display the Membership window. If the membership item is sold out, the system does not generate a customer membership.

See [Entering Customer Memberships in Order Entry](#).

Defaults and overrides: The customer, payment information, and original source code default from the order to the customer membership; however, you can override the pay type or recipient customer for the membership, or enter an alternate shipping address.

Default from membership program: The source code and order type default from the membership program to the customer membership, in addition to the items, shipment interval, and discount, if any. The ship via also defaults from the membership program if it is specified

there; otherwise, it defaults from the current ship via on the order header. You can also override these defaults in the membership type allows it.

Updating the membership after entry: Aside from [Canceling a Membership Item](#), changes you make to the order in order maintenance do not update the customer membership. You must use [Working with Customer Memberships \(WWCM\)](#) to maintain a membership once you have created it; or, you can work with customer memberships by selecting Customer Memberships at the [Display More Options Screen](#) in order entry or order maintenance (available by selecting [Options](#)).

Order message: The system writes an order message indicating the name of the membership program and the Next release date if the [Write Order Messages for Membership Rotation \(K04\)](#) system control value is selected. This order message is flagged to print on the pick slip. See the system control value for more information.

Cash amount: If you create a customer membership while entering a prepaid order, the system displays a pop-up window in which you can specify the amount of the prepayment to apply to the membership.

For example, the customer sends a check for \$100.00, and the current order total is \$20.00. At the pop-up window, you would apply \$80.00 toward the customer membership.

As you generate orders for the customer membership, the system applies cash from the membership prepayment amount of \$80.00 until this amount is exhausted. Afterward, any orders you generate for the membership will go on hold until you apply sufficient payment. However, if there is a cash amount remaining after you generate the last order for the membership (that is, any items have been included on orders the specified number of times), the system creates a refund.

When you review the originating order in standard or streamlined order inquiry, the payment amount for the order appears as \$20.00, not \$100.00. However, an order history message will indicate that you have applied a prepayment to a customer membership and note the amount.

For more information: See [About Entering Cash Amounts for a Customer Membership](#) for more information on entering cash for a membership.

Other payment methods: You can also use a credit card payment method for a membership. The payment method from the order defaults, but you can override this default for the membership.

The system goes through the same credit checking when you generate an order for a membership as for any other order, based on the payment method.

Order total pop-up: If the [Display First Membership Order Total \(G14\)](#) system control value is *selected*, the system displays a pop-up window providing the estimated dollar total for the first membership order when you accept an order creating a membership.

Closing the order: If the membership item is the only item on the order, the order remains open until you generate pick slips, provided the entire order is eligible based on the pick slip generation criteria. At that point, the order then closes automatically (assuming it does not fail authorization if it is paid by credit card).

**Note:**

You cannot create a loyalty membership through order entry as described above. See [Loyalty Memberships](#) for an overview.

Work with Customer Memberships

Purpose: In addition to creating a standard customer membership in order entry, you can use the [Working with Customer Memberships \(WWCM\)](#) menu option. You can also use this menu option to review or work with existing customer memberships. Additional options at this menu option include:

- Changing a membership's status (deactivating, reactivating, or canceling)
- Changing the release date or the next rotation
- Deleting a membership if you have not yet generated any orders for it
- Changing information, such as shipment intervals, recipient or alternate address, items, pay type, or discount

Required information: When you create a membership through the Work with Customer Memberships menu option, you must include any required information, such as pay type, customer, and recipient, that would default from the order if you create a membership in order entry.

You cannot charge a customer for the membership itself if you create it through this menu option.



Note:

You cannot create a loyalty membership through this menu option. See [Loyalty Memberships](#) for an overview.

Generating Orders

Purpose: Use the [Generating Membership Orders \(EGMO\)](#) menu option to create new orders for standard customer memberships. This menu option selects active memberships based on release date. You can also restrict the selection based on membership type.

Memberships in error: The system does not attempt to create an order and prints the membership on an error report, in the following scenarios:

- There are no items specified for the membership.
- The payment information is not complete.

Other types of errors do not prevent the system from generating the order; however, the order is in suspended status and is listed on the [Print Remote Order Errors Report](#). For example, an order fails the edit if it includes an item that does not have a price, or has an invalid SCF/ship via combination. You can use batch order entry, described in [Accepting or Rejecting the Order Batch](#), to correct such orders and resubmit them to the phone edit process. When the membership order is accepted, the system clears the batch number from the order header.

Expected Membership Orders Report

Purpose: Use the [Expected Membership Orders Report](#) to review the total number of standard memberships that are eligible to generate orders based on the next release date. This report provides totals for each release date, and does not contain any detailed information.

For more information: See [Printing the Expected Membership Orders Report \(PEMO\)](#).

About Discount Memberships

Purpose: If you set up a standard membership program for discounting purposes only (that is, you will not be generating orders), you should be aware of the following:

- *Flagged as errors at order generation:* Discount-only memberships will appear on the Memberships in Error report when you generate membership orders unless you select only membership types that produce orders.
- *Must have eligible status for discount:* The discount applies only if the customer membership is in an active, in process or error status; otherwise, no discount will apply.
- *Discounting price of membership item:* Any discount will apply to the price of the membership item itself in order entry, unless you *select* the Discountable field for the membership item.
- *Membership remains open:* A discount-only customer membership will never close automatically. Even after the discount end date passes, the membership will remain active, although the discount will no longer apply to new orders.
- *Initial shipment:* In order to include one order shipment to the customer to initiate a discount-only membership, you should set up the item(s) using the Accompanying Item option at the [Work with Item Offers Screen](#). If you attempt to generate the initial shipment through standard membership order generation, the membership's status will change to Complete after you generate the order, and the discount will no longer apply.



Note:

The above refers to standard discount memberships, that is, memberships that you sell or create. See [Loyalty Memberships](#) for information on memberships that the background jobs assign to customers based on order history.

Loyalty Memberships

Overview: You can have the system create customer loyalty memberships automatically when a customer reaches a required merchandise sales, order, or external sales dollar total value, or when a customer has a specified customer class. These loyalty membership programs can provide various benefits to the customer, such as:

- a percentage discount to default in order entry
- free freight
- higher backorder priority
- special customer class

You can set up a single loyalty program or graduated loyalty programs. For example, you can offer a discount of 5% when a customer reaches \$1000 in total orders, a discount of 10% when a customer reaches \$1500, and so on.



Note:

The total dollars used to evaluate a customer for loyalty membership are based on merchandise only, and do not include charges such as tax, freight, or handling. The merchandise total is based on the actual selling price of items on orders.

System control value: The [Use Loyalty Membership Program \(I81\)](#) system control value controls whether the system evaluates customers for loyalty program membership.

When does evaluation take place? The system evaluates customers for loyalty membership during the order and billing background jobs, as described in the following table.

Program Type	Membership created if:	Evaluated When?
order (O)	1. the LTD dollars required for the program is less than the \$ order total for all entries in the Order Billing History table since the Effective start date specified for the loyalty program. If there is no Effective start date specified for the program, the customer's entire order history is compared with the LTD dollars requirement. If there is an External sales amount specified in the Customer Order History table, this amount is added to the order dollar total; or, 2. the customer is assigned to the Customer class requirement for the program.	ORDR_ASYNC

 Note:

If the program specifies both a LTD dollars and a Customer class requirement, the customer must meet both requirements to earn the membership.

sales (S)	• the LTD dollars required for the program is less than the \$ sold total for all entries in the Order Billing History table since the Effective start date specified for the loyalty program. If there is no Effective start date specified for the program, the customer's entire sales history is compared with the LTD dollars requirement. If there is an External sales amount specified in the Customer Order History table, this amount is added to the order dollar total; or, • the customer is assigned to the Customer class requirement for the program.	BILL_ASYNC

 Note:

If the program specifies both a LTD dollars and a Customer class requirement, the customer must meet both requirements to earn the membership.

Program Type	Membership created if:	Evaluated When?
external (E)	- the LTD dollars required for the program is less than the External sales amount specified in the Customer Order History table plus the \$ order total for all entries in the Order Billing History table since: - the External sales date specified in the Customer Order History table; if any; otherwise, - the Effective start date specified for the loyalty program, if any; otherwise, - If there is no Effective start date specified for the program, the customer's entire order history is compared with the LTD dollars requirement; or, - the customer is assigned to the Customer class requirement for the program.	ORDR_ASYNC BILL_ASYNC

 Note:

If the program specifies both a LTD dollars and a Customer class requirement, the customer must meet both requirements to earn the membership.

Example:

You set up an order dollars-based loyalty program with a LTD dollars requirement of \$500 and an Effective start date of 01/01/06 so that you can provide customers who have placed \$500 in orders in the current year with a 10% discount.

A customer has the following order activity in the Order Billing History table:

12/01/05: \$200.00

01/31/06: \$200.00

02/06/06: \$100.00

The customer places an order with a merchandise total of \$250.00.

Result: When the current order is processed by the ORDR_ASYNC job, the customer is assigned to the loyalty program based on a total dollar value of \$550.00 as follows:

- the \$200.00 from 01/31/06
- the \$100.00 from 02/06/06
- the \$250.00 from today's order

The \$200.00 from the 12/01/05 order is not included in the total, because it was placed before the Effective start date.

**Note:**

The External sales and External sales date fields are not populated by any Order Administration process.

Graduated loyalty programs: You can set up multiple loyalty programs so that customers can be “promoted” from one to the next as their sales or order totals increase. The background jobs use the Priority assigned to each loyalty program to determine the order in which they should evaluate whether a customer qualifies for each loyalty program. A higher-priority loyalty program should be assigned a lower Priority number so that the background jobs evaluate the customer against this program first.

Example: You have three current sales-based loyalty programs with the same Effective start date:

- **GOLD:** 10% discount plus free freight. Requires \$1500 in sales, and has a priority of 1.
- **SILVER:** 10 discount. Requires \$1000 in sales, and has a priority of 2.
- **BRONZE:** 5% discount. Requires \$500 in sales, and has a priority of 3.

You ship an order to a customer for a total of \$1000 in merchandise. The customer's previous total sales \$ in the Order Billing History table since the Effective start date was \$100, raising the new total to \$1100.

Result:

1. The BILL_ASYNC job checks the GOLD program first because its priority is 1. The customer does not qualify.
2. The BILL_ASYNC job next checks the SILVER program, because it has the next priority level. The customer qualifies for this loyalty program. The BILL_ASYNC job assigns the customer to the SILVER loyalty program and stops checking other loyalty programs.

**Note:**

Typically, you would set up graduated loyalty programs using a lower priority number (higher priority) for higher-level programs, as in the example above; however, if there is more than one current loyalty program with the same Priority, the background job evaluates these programs in alphanumeric order.

Only one active loyalty membership at a time: The background jobs evaluates the customer against the current loyalty programs each time there is order activity, such as entering, maintaining, or billing an order. If the customer qualifies for a higher-level loyalty program as a result of order activity, the job deactivates the customer's current loyalty membership and activates a new one. Similarly, if the customer no longer qualifies for a higher-level loyalty program due to order activity that reduces the qualifying total, such as a cancellation, the job deactivates the current loyalty membership and activates the appropriate lower-level one. A customer cannot have more than one active loyalty membership.

Notifying the customer: The system generates a notification email to the customer each time a loyalty membership is activated or deactivated through the background jobs. You can set up individual activation and deactivation templates at both the company level and the entity level. See the [Loyalty Setup](#) described below for more information.

When does the customer receive the discount? If the customer qualifies as a result of order activity, the background jobs perform loyalty program assignments after you complete entering, updating, or billing an order. As a result, the loyalty discount never applies on the order which qualifies the customer for the loyalty membership. However, the next time the customer places an order, the discount and other benefits of the loyalty program default to the order.

Loyalty discounts and other benefits do not default in order maintenance, only on new orders.

How long does a customer loyalty membership last? A loyalty membership can be deactivated in the following ways:

- You can deactivate or cancel a customer's loyalty membership through the [Working with Customer Memberships \(WWCM\)](#) menu option.
- If you specify a number of months as the Discount duration for a loyalty program, the system creates customer loyalty memberships with a Discount end date based on this duration. For example, if you set the Discount duration to 12, and a customer qualifies for the loyalty program on 10/18/06, the system sets the Discount end date to 10/18/07 (12 months later). No discounts or other benefits apply in order entry once the Discount end date is reached. However, if you do not specify a Discount duration for a loyalty program, the system does not set a Discount end date for the customer's loyalty membership.
- Each time the background jobs process orders for a customer, they evaluate the customer's current loyalty membership assignment. If the customer is currently assigned to a loyalty membership but should now be assigned to a different program, the background job deactivates the customer's current membership and creates the new membership. Similarly, if the customer no longer qualifies for the current loyalty membership and does not now qualify for any other existing loyalty program, the background job simply deactivates the current loyalty membership.

What information is stored with the customer loyalty membership? When the background jobs create a loyalty membership for a customer, the information that defaults from the loyalty program settings includes:

- Discount end date
- Discount %
- Priority B/O, if any
- Free freight, if any

**Note:**

If the customer is eligible for free freight through a loyalty program, you cannot apply a promotion that includes free freight. See [Working with Promotions \(WPRO\)](#) for background.

Netting returns, cancels, and soldouts: When you set up loyalty programs, you have the option of netting (or subtracting) the merchandise value of returns, exchanges, cancellations, and soldouts from the total dollar value of sales or orders used to determine whether a customer qualifies for a loyalty program.

Example: A customer is currently assigned to an order-based loyalty program with a LTD dollars requirement of \$500 and an Effective start date of 01/01/06. The customer has the following order activity in the Order Billing History table since the Effective start date:

02/06/06: \$100.00

09/12/06: \$200.00

The customer's External sales field is currently set to \$250.00.

The customer cancels \$100.00 of the merchandise on the 9/12 order.

Result: When the current order is processed by the ORDR_ASYNC job, the customer's total order dollars of \$550.00, and the total canceled dollars is \$100.00. The loyalty program's Net cancels flag is *selected*. When the system subtracts the \$100.00 cancellation from the \$550.00 orders total, the remaining \$450.00 is not enough to qualify for the loyalty program. The customer's membership in the loyalty program is deactivated.

Troubleshooting loyalty programs that net returns, cancels, and soldouts:

- *Activity against orders before the Effective start date:* Returns, exchanges, cancellations, or soldout activity is evaluated based on the date of the activity itself, rather than the date of the original order. For example, you process a return of \$50 in merchandise on January 31 against an order that was entered on December 30. The system is evaluating the customer for a loyalty program with an effective start date of January 1. The value of the \$50 return is subtracted from the total dollar value since January 1, even though the order was originally entered before that date.
- *Exchange activity:* If the Net returns/exchanges flag is *unselected* and you process an exchange, the dollar value of the exchange, or replacement, item is included in the calculation of loyalty eligibility. For example, if the customer exchanges an item with a selling price of \$50 for an item with the same selling price, this activity effectively increases the customer's total merchandise value to date by \$50 if you do not net returns and exchanges.
- *Update demand flag:* A cancellation always reduces the total merchandise order amount if you use a cancel reason code whose Update demand? flag is *selected*. The result of this type of cancellation might be to make a customer ineligible for a particular loyalty program if it is based on the order total.
- *Update demand for order maintenance transactions?* If the [Update Demand for Order Maintenance Transactions \(C72\)](#) system control value is *unselected*, it is possible to understate the customer's total merchandise order dollars. Because the order dollar total in this situation does not increase if, for example, you add an item in order maintenance, processing a cancellation (or return, exchange, or soldout) can have the effect of "double dipping" when the system subtracts the cancellation dollars from the order total. For example, a customer's total dollars ordered is \$500.00. You add a \$100.00 item in order maintenance, and then cancel it. Because the total dollars ordered was never increased by the \$100.00 in order maintenance, the cancellation effectively reduces the customer's total dollars ordered to \$400.00. For this reason, you might want to leave the netting flags for a loyalty program unselected if the [Update Demand for Order Maintenance Transactions \(C72\)](#) system control value is *unselected*.

Reviewing order and sales totals: Use the following screens to review the customer's order and sales activity:

- [Display Customer Order History Screen](#): Displays totals for the customer life-to-date (that is, not restricted based on a range of activity dates). This information is stored in the Customer Sold To Order History table.
- [Customer Sold To Order History Screen \(Reviewing Detail\)](#): A listing of each activity that updated the total orders, sales, returns, exchanges, cancellations, exchanges, or soldouts in the Order Billing History table. You can also generate the Customer Sold To Order History Detail report by selecting *Print List* at this screen.
- [Order Billing History Detail Screen](#): Displays detail on a single Order Billing History Detail record. The system creates a separate record for each order activity.

Consolidating Order Billing History: If you use the [Consolidating Order Billing History \(MOBH\)](#) menu option, you need to have Consolidate by Customer *selected* in order to include activity in the consolidated date range to evaluate customers for loyalty memberships. If you have Consolidate by Customer *unselected*, the system consolidates records using a customer number of zero, so the order activity for the consolidated date range cannot be used for loyalty evaluation purposes.

Turning loyalty evaluation on or off: The [Use Loyalty Membership Program \(I81\)](#) system control value controls whether the background jobs evaluate customers for loyalty eligibility; however, it does not prevent the discount percentage for an existing loyalty membership from applying when the customer places an order. In order to prevent the discount from applying, you would need to use [Working with Customer Memberships \(WWCM\)](#) to deactivate the loyalty membership, or wait until the Discount end date for the loyalty membership is reached.

Loyalty Setup

The required and recommended setup for using loyalty memberships is described below.

System control values:

- [Use Loyalty Membership Program \(I81\)](#): Controls whether the background jobs evaluate customers for loyalty membership based on order activity.
- [Loyalty Membership Activation Notification Email Program \(I82\)](#): Specifies the program to generate the loyalty membership activation email.
- [Loyalty Membership Deactivation Notification Program \(I83\)](#): Specifies the program to generate the loyalty membership deactivation email.
- [Alternate Customer Number Label Description \(H95\)](#): Specifies the text to include in the Subject line for loyalty membership notification emails as well as on certain screens. For example, if this system control value is set to *Reward #*, the subject lines are *Reward # Activation* or *Reward # Deactivation*. If this system control value is unselected, the Subject line uses *Loyalty Activation* or *Loyalty Deactivation*.
- [Update Demand for Order Maintenance Transactions \(C72\)](#): See the troubleshooting information above for considerations related to the setting of this system control value.

Membership types: Use the [Working with Membership Types \(WWMT\)](#) menu option to create one or more membership types with the Loyalty flag *selected*. The membership type also specifies whether you can change existing customer loyalty memberships.

Membership programs: Use the [Working with Membership Programs \(WWMP\)](#) menu option to create one or more loyalty membership programs, specifying a membership type that has the Loyalty flag *selected*.



Note:

Do not mix active orders-based, sales-based, or external dollars-based loyalty programs in a single company; it is best to have a single method for evaluating customers for loyalty memberships.

Email templates: Use the [Working with E-Mail Notification Templates \(WEMT\)](#) menu option to specify the text to include in the activation and deactivation emails. You can also set up an email template at the entity level as an override; see [Email Setup within Order Administration](#) and [Working with E-Mail Notification Templates \(WEMT\)](#).

You can also use the [Work with Entity Email Overrides Screen](#) to specify the “from” email address to use on these notification emails. However, using a different “from” email address based on entity for various notifications, such as the loyalty membership activation or deactivation notice, might be confusing to your customers if the same customers commonly place orders in multiple entities within your company. In this situation, the “from” email address on a deactivation email might not match the entity where the customer places the majority of his or her orders.

For example, a customer might qualify for a loyalty membership based on orders placed in entity 1, and receive a loyalty activation notice using the “from” email address for this entity. Then the customer places an order in entity 2 that makes him eligible for a higher loyalty program. In this situation, it is possible for him to receive a deactivation notice for the first loyalty membership using the “from” email address from entity 1, and an activation notice for the second loyalty membership using the “from” email address from entity 2.

**Note:**

The background jobs generate email notifications for a customer only if the order type has the Email notification flag *selected* and the customer's Opt-in/out setting (see [Determining the Opt-in/out Setting](#)) is O1 or O2.

For more information: See:

- [Working with Membership Types \(WWMT\)](#)
- [Working with Membership Programs \(WWMP\)](#)
- [Working with Customer Memberships \(WWCM\)](#)
- [Working with E-Mail Notification Templates \(WEMT\)](#)
- [Use Loyalty Membership Program \(I81\)](#)
- [Loyalty Membership Activation Notification Email Program \(I82\)](#)
- [Loyalty Membership Deactivation Notification Program \(I83\)](#)
- [Operating the Background Jobs](#)

Updating Memberships

Purpose: You can use the [Update Customer Memberships \(MMCM\)](#) to update the source codes and/or replace an item on customer memberships for one or more membership programs. This function also provides the option to update the membership program(s) as well. See [Update Customer Memberships \(MMCM\)](#) for more information.

Email Repository

In this part:

- [Working with Email Category \(WEMC\)](#) provides information on setting up categories for tracking and grouping emails.
- [Purging Email History \(MPCH\)](#) provides information on purging emails earlier than a given date.
- [Updating Email Domains \(MUEE\)](#) provides information on making universal updates to the domain name for all matching email addresses in your company.

- [Printing the Email Error Report \(PEME\)](#) provides information on printing a report listing all email addresses in your company that do not conform to formatting requirements.

Customer Service Appendices

Purpose: These topics provide reference information for use throughout the system.

- [Displaying More Options in OIOM](#) describes several options related to Order Inquiry, Order Maintenance and Order Entry that are not available on the regular screens.
- [Loading Address Updates](#) describes how to load and process a table containing Sold To Customer address updates, and how to review changed and unchanged customer information.

Displaying More Options in OIOM

Purpose: Select *Options* or *More Options* when you are [Entering Orders](#), using standard [Order Inquiry](#), or using order maintenance, to display a screen that provides additional related options that are unavailable on the regular screens.

In this topic:

- [Display More Options Screen](#)
- [Work with Ticklers Screen \(order view\)](#)
- [About Customer Action Notes](#)
 - [Edit Customer Actions Window](#)
- [Work with Email by Order Number Screen](#)
- [Work with Customer Profile Screen](#)
- [Work with Email by Customer Sold To Number Screen](#)
- [Edit Customer Notes Screen](#)
- [Work with Email by Customer Ship To Number Screen](#)
- [Work with Email by Customer Bill To Number Screen](#)
- [Display Pick Tickets for Order Screen](#)
- [Display Order Totals Window](#)
- [Work with Subscriptions Screen](#)
- [Customer Order Item History Screen](#)
- [Brokered Backorder Summary Screen](#)

Display More Options Screen



Note:

The Void/Reprint Picks option is not available in standard order inquiry and the Subscriptions option is not available in order entry/maintenance; however, these options are consolidated on one screen for documentation purposes.

Field	Description
Order #	The number of the order and the order ship-to (shipping address) you are currently working with. Order number: numeric, 8 positions; display-only. Ship-to number: numeric, 3 positions; display-only.
Sold to	A unique number to identify the customer who placed the order, and the customer's name or company name. Customer number: numeric, 9 positions; display-only. Name: alphanumeric, 41 positions; display-only.
Bill to	The bill-to customer associated with the customer who placed the order. Numeric, 7 positions; display-only.

Available options:

- *Customer action notes*: select this option to enter, update, delete or resolve an action issue for a customer. A pop-up action window opens each time you select the customer until the issue is resolved. See [About Customer Action Notes](#).
- *Customer notes*: select this option to record or view information about the current customer. See [Edit Customer Notes Screen](#).
- *Customer ownership*: select this option to work with products a customer owns. If customer ownership records have been defined for the customer, you advance to the [Work with Customer Ownership Screen](#); otherwise, you advance to the [Create Customer Ownership Screen](#).
- *Customer profile*: select this option to create a demographic profile for the current customer, which may describe the customer's gender, age, income, geographic location, or other types of demographic data. See the [Work with Customer Profile Screen](#).
- *Customer email addresses*: select this option to advance to the [Work with Customer Email Address Screen](#), where you can review and work with email addresses for a sold-to customer.
- *Customer memberships*: select this option to review or work with membership programs you use to generate periodic orders for the customer. This screen opens each customer membership for the sold-to customer on the current order. This information appears only for the customer who purchased the membership, not the recipient (if any). If the membership was created through order entry rather than the Work with Customer Membership menu option, the order number appears on this screen. You cannot create a customer membership through this screen. See [Working with Customer Memberships \(WWCM\)](#).
- *Customer warranty information*: select this option to review, create, change, and delete customer warranty information for a product on the order. See the [Work with Customer Warranty Information Screen](#).
- *Customer order item history*: select this option to advance to the [Customer Order Item History Screen](#) to display items that the customer has ordered on previous orders.
- *Display invoices*: select this option to advance to the [Display Invoices Screen](#) where you can review invoices associated with the order.
- *Display picks*: select this option to find out the status of picks generated for an order, such as when they were prepared, printed and confirmed. See the [Display Pick Tickets for Order Screen](#).

- *Email for customer bill to:* select this option to advance to the [Work with Email by Customer Bill To Number Screen](#), where you can review or work with emails sent to or received from the sold-to or bill-to customer on the order.
- *Email for customer ship to:* select this option to advance to the [Work with Email by Customer Ship To Number Screen](#), where you can review or work with emails sent to or received from the sold-to customer on the order.
- *Email for customer sold to:* select this option to advance to the [Work with Email by Customer Sold To Number Screen](#), where you can review or work with emails sent to or received from the sold-to, ship-to, or bill-to customer on the order.
- *Email for order:* select this option to advance to the [Work with Email by Order Number Screen](#), where you can review or work with emails sent to or received from the customer related to the current order.
- *Loyalty Account:* Select this option to review loyalty account information from Oracle Retail Customer Engagement for a customer. When you select this option, the system retrieves the customer's information from Oracle Retail Customer Engagement.
 - If Oracle Retail Customer Engagement finds a loyalty card assigned to the customer, the system advances you to the [Display Loyalty Account Screen](#). If more than one loyalty card is assigned to the customer in Oracle Retail Customer Engagement, the system displays loyalty account information for the first card assigned to the customer.
 - If Oracle Retail Customer Engagement does not find a loyalty card for the customer, the system advances you to the [Customer Loyalty Registration Window](#), where you can select to enroll the customer in the Oracle Retail Customer Engagement Loyalty program.
 - If a Relate ID is not defined for the customer in the Customer Sold To table, the system displays an error message similar to the following: `This customer does not have a Relate ID.`
 - If a connection could not be made to Oracle Retail Customer Engagement, the system displays an error message similar to the following: `Unable to connect to ORCE.`

**Note:**

This option is available only if the [Use ORCE Loyalty \(M06\)](#) system control value is selected. See [Customer Engagement Loyalty Integration](#) for an overview.

- *Order totals:* select this option to view accumulated totals across all shipping addresses (recipients) on an order. See [Display Order Totals Window](#).
- *Print/Email Quotes:* Select this option to advance to the [Print/Email Quote Window](#), where you can select to print the Quote form or generate the Quote Confirmation email. See [Entering Pre-Order Quotes](#). **Note:** This option is available only for orders whose order type has the Quote option selected. In addition, this option does not display if the [Quote Printing Program \(K73\)](#) and [Quote Confirmation Email Program \(K74\)](#) system control values do not contain a value or if all of the items on the quote are soldout and the Exclude S/O on order confirmation field for the order type on the quote is selected.
- *Purchase History:* Select this option to review completed sales and return transactions from Oracle Retail Customer Engagement for a customer. When you select this option, the system retrieves the customer's information from Oracle Retail Customer Engagement and advances you to the [Display Purchase History Screen](#). If a connection could not be made to Oracle Retail Customer Engagement, the system displays an error message similar to

the following: Unable to connect to ORCE. **Note:** This option is available only if the [ORCE Customer Integration \(L37\)](#) system control value is set to *INTERACT*. See [Customer Engagement Purchase History Integration](#).

- *Rewards Points*: Not implemented.
- *Send contact us email*: Select this option to generate an email requesting that the customer contact you about the order. See the [Summary of Customer Correspondence](#) for more information on when this option is available, and see the [“Contact Us” Notification Sample and Contents](#) for more information on the generated email.
- *Subscriptions (standard order inquiry only)*: select this option to review, fulfill, or modify the subscription ordered by the customer. See the [Work with Subscriptions Screen](#).
- *Ticklers*: select this option to work with ticklers associated with the order. See [Work with Ticklers Screen](#). This option is available only if the [Use Workflow Management \(H96\)](#) system control value is *selected*.
- *Void/reprint picks (order entry/maintenance only)*: select this option to void or reprint a pick slip for a previous order for the customer, if, for example, the customer wants to use a different shipping service. See the Reprint/Void Pick Slips by Order Screen in [Reprinting and Voiding Pick Slips \(WVRP or WSVP\)](#).

Work with Ticklers Screen (order view)

Purpose: Use this screen to review, work with, and resolve ticklers associated with the order, sold to customer on the order, and bill to customer on the order.

Secured feature: If you do not have authority to the [Update All Ticklers \(B09\)](#) secured feature, you cannot update a tickler that is not assigned to you or your tickler groups or an error message indicates: *Not authorized to change*.

This secured feature controls updating a tickler by:

- selecting *Change* for a tickler to change it.
- selecting *Delete* for a tickler to delete it.
- selecting *In process* for a tickler to assign the tickler to yourself.
- selecting *Resolve* for a tickler to resolve it.

If you do not have access to this feature, you can update only ticklers assigned to you or your tickler groups. However, you can still release an order associated with the tickler from hold.

See [Workflow Management Overview and Setup](#) for an overview and required setup for workflow management processing.

How to display this screen: At the [Display More Options Screen](#), select *Ticklers*.

Field	Description
Order #	The order associated with the ticklers on the screen. Numeric, 9 positions; display-only.

Field	Description
Status	The status of the order. Valid values: • Open • Archived (This option is not currently implemented) • Cancelled • Held • Purged • Quote • Suspended • Closed Alphanumeric, display-only.
Sold to	The number and description of the sold to customer associated with the ticklers on the screen. Sold to number: Numeric, 9 positions; display-only. Sold to description: Alphanumeric, 40 positions; display-only.
Bill to	The number and description of the bill to customer associated with the ticklers on the screen. Bill to number: Numeric, 9 positions; display-only. Bill to description: Alphanumeric, 40 positions; display-only.
Status	The status of the tickler. Valid values: • <i>Open</i> = the tickler is open and is available to work on in the assigned tickler work queue. • <i>Inprocess</i> = the tickler is currently being worked on by the assigned user. • <i>Resolved</i> = the tickler has been resolved. Optional.
P (tickler priority)	The priority of the tickler, indicating how important the issue associated with the tickler is to resolve (1 is the lowest priority and 9 is the highest priority). Numeric, 1 position; optional.
Assigned (assign date)	The date the tickler was assigned to the user or tickler user group. Numeric, 7 positions (in user date format); optional.
Ev (tickler event code)	The code for the tickler event that created the tickler. Valid values: • <i>BO</i> = Backorders • <i>CO</i> = Cancelled orders • <i>HO</i> = Held orders • <i>MN</i> = Manually created • <i>NO</i> = New orders • <i>OO</i> = Aged open orders • <i>SO</i> = Sold out orders • <i>UP</i> = Unconfirmed pick tickets • <i>VP</i> = Voided pick tickets • <i>WF</i> = Remote workflow See System Delivered Tickler Events. Alphanumeric, 2 positions; optional.

Field	Description
Cat (tickler category)	The tickler category assigned to the tickler. Tickler categories are defined in and validated against the Tickler Category table; see Working with Tickler Category (WTCT) . Alphanumeric, 3 positions; optional.
Tickler#	The tickler number assigned to the tickler, from the Tickler Number number assignment record. Numeric, 9 positions; optional.
User group	The group ID of the tickler user group assigned to the tickler. Tickler user groups are defined in and validated against the Tickler User Group table; see Working with Tickler User Groups (WTUG) . Tickler group ID: Alphanumeric, 10 positions; display-only.
User	The user ID of the user assigned to the tickler. Users are defined in and validated against the User table; see Working with User Records (WUSR) . User ID: Alphanumeric, 10 positions; display-only.
Item	The item associated with the tickler. Alphanumeric, 12 positions; optional.
OST# (order ship to number)	The order ship to associated with the tickler. Numeric, 3 positions; optional.

Screen Option	Procedure
Change a tickler	Select <i>Change</i> for a tickler to advance to the Change Tickler Screen .
Delete a tickler	Select <i>Delete</i> for a tickler to delete it. You can only delete <i>MN</i> (manually created) ticklers.
Display a tickler	Select <i>Display</i> for a tickler to advance to the Display Tickler Screen. See the Change Tickler Screen for field descriptions.
Release the order associated with the tickler from hold	Select <i>Release</i> for a tickler to advance to the Release Reason Prompt Pop-Up Window (order header hold), Release Recipient Hold Reason Pop-Up Window (recipient hold), and/or Release Order Payment Method Window (pay type hold). If you release an order from hold for an <i>HO</i> (held order) tickler, the system automatically resolves the tickler. Also, the system evaluates any other ticklers associated with the order to determine if they can be resolved.

Screen Option	Procedure
	If you select <i>Release</i> for a tickler not associated with a held order, an error message indicates: <code>Order not on hold</code>. If you select <i>Release</i> for a tickler not associated with an order, an error message indicates: <code>Tickler not eligible for this option</code>.
	 Note: You must have authority to the Release Held Orders menu option to release the order from hold.
Select a tickler to work on	Select <i>In Process</i> for a tickler to change the status of the tickler from open to in process. You can only select to work with a tickler that is in an open status; if you select <i>In process</i> for a tickler that is in an in process or resolved status, an error message indicates: <code>Tickler status cannot be changed - resolved or already in process</code>. Selecting this option automatically assigns the tickler to the user and creates a tickler history record.
Enter or review tickler work notes	Select <i>Notes</i> for a tickler to advance to the work notes screen, based on the note type defined for the tickler. Note type <i>A</i> advances you to the Edit Customer Actions Window. Note type <i>B</i> advances you to the Work with Bill To Notes Screen. Note type <i>O</i> advances you to the Work with Order Messages Screen. Note type <i>S</i> advances you to the Edit Customer Notes Screen. Note type <i>T</i> advances you to the Work with Tickler Notes Screen.
Review the tickler source	Select <i>Detail</i> for a tickler to advance to the source screen, based on the tickler event associated with the tickler. <i>BO</i>, <i>CO</i>, <i>HO</i>, <i>NO</i>, <i>OO</i>, <i>SO</i>, <i>UP</i>, <i>VP</i>, and <i>WF</i> ticklers advance you to the Order Inquiry Header Screen. You cannot view the source for <i>MN</i> ticklers: Requested tickler has no source reference.
Review tickler history	Select <i>History</i> for a tickler to advance to the Work with Tickler History Screen.
Resolve a tickler	Select <i>Resolve</i> for a tickler to advance to the Resolve Tickler Window.
Review procedures for a tickler	Select <i>Procedure</i> for a tickler to advance to the Work with Tickler Event Rule Procedure Screen. You cannot add or change tickler procedures when you advance from the Work with Tickler screen. You cannot review procedures for <i>MN</i> ticklers.

Screen Option	Procedure
Create a tickler for the <i>MN</i> (manually created) tickler event	Select <i>Create</i> to advance to the Create Tickler Screen .
 Note: To create a <i>MN</i> tickler, you must have authority to the Create Manual Tickler (B13) secured feature.	
Review the number of ticklers in the work queue, based on the selection criteria you have defined	Select <i>Count</i> to advance to the Current Tickler Count Window window.
Toggle between displaying open and in use ticklers or resolved ticklers	Select <i>Open/Resolved</i> . The system toggles between displaying: • ticklers in an open or in process status. • tickler in a resolved status.
Review ticklers associated with the sold to customer on the order	Select <i>Cust sold to</i> to advance to the Work with Ticklers Screen (sold to customer view) .

About Customer Action Notes

Purpose: Use Customer Action Notes to identify and address critical customer issues that need action. The two options you can use to enter, delete, display, resolve, update the status, or attach detailed notes about a customer issue are:

- [Edit Customer Actions Window](#)
- [Work with Email by Order Number Screen](#)

You can use the Customer Actions function to enter and track customer issues regarding an order (or anything else). In a customer action note you can:

1. Enter a brief statement about a customer issue or problem.
2. Enter a reason code to identify the issue or problem for further grouping and reports.
3. Assign the issue to a specific user for follow up or resolution.
4. Add detailed information describing the customer issue.
5. Update the status of the action from *O* (open) to *W* (work in process), and, optionally, override the assigned user.
6. Identify the issue as *R* (resolved) when it meets the customer's satisfaction.

Dealing with customer action issues: To resolve an unresolved action issue you should:

1. Review the action description, which is a brief description of the problem.
2. Respond to the issue by:
 - Selecting *Delete* to delete the issue immediately.
 - Selecting *Display* to review time and date statistics associated with the customer action.
 - Selecting *Detail Notes* to view or enter detailed information about the action issue.

- Selecting *Work in Process* to view or enter detailed information about the action issue. This option also automatically updates the status from *O* (open) to *W* (work in process), and automatically updates the most recent user.
- Selecting *Resolve* to resolve the issue and change the status from *O* (open) or *W* (work in process) to *R* (resolved).

Secured features: The following secured features define whether you have authority to add, delete, update, or resolve customer action issues:

- [Change Customer Action Notes Description \(A93\)](#)
- [Add Customer Action Detail Notes \(A94\)](#)
- [Change Customer Action Detail Notes \(A95\)](#)
- [Delete Customer Action Notes \(A96\)](#)
- [Change Customer Action Notes Status/Work in Process \(A97\)](#)
- [Change Customer Action Notes Status/Resolve \(A98\)](#)

Edit Customer Actions Window

Purpose: A pop-up window opens during order entry or when you work with Customer Memberships when you select a customer with an unresolved action issue. This window opens when you select *OK* at the order header screen and the system validates your entries. The system assigns a status of *O* (open) to all new customer action issues. The status can be updated to *W* (work in process) if the issue has been investigated but not yet resolved. The customer actions pop-up window opens each time you select this customer (through order entry, standard order inquiry, order maintenance, customer maintenance, or customer memberships) until you mark the action issue as *R* (resolved).

[Printing the Customer Exposure Report \(PCER\)](#)

Note:

- This window opens automatically only once per order.
- This window displays the customer action issues entered for a single customer. To review all action issues in your company, use the [Work with Email by Order Number Screen](#) menu option.
- You can print a report listing customer action notes by date or by the person who entered them. See and [Printing the Customer Detail Exposure Report \(PCAR\)](#).
- This window does not open in streamlined order inquiry.

How to display this window:

- at the [Display More Options Screen](#), *Select* for Customer Action Notes.
- select *Actions* for a customer at a *Work with Customer* screen (see [Selecting Customers](#))
- select *Customer Actions* at the *Create or Change Customer Sold To* screen (see [Creating and Updating Sold-to Customers \(WCST\)](#)).

If you [Use Workflow Management \(H96\)](#):

- select *Notes* for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or [Workflow Management Screen](#) (tickler supervisor).
- select *OK* at the [Create Tickler Screen](#).
- select *Notes* at the [Change Tickler Screen](#) or *Display Tickler Screen*.

Field	Description
Customer (Sold-to customer number)	A number assigned by the system to identify the customer. Numeric, 9 positions; display-only, assigned by the system.
Customer name (unlabeled field to the right of the Customer field)	The customer's last name, first name and middle initial. Last name: alphanumeric, 25 positions; display-only. First name: alphanumeric, 15 positions; display-only. Initial: alphanumeric, 1 position; display-only.
Action description	The issue that needs to be investigated and resolved for the customer. Enter only 1 issue per line. If necessary, enter more information about the issue by selecting <i>Detail notes</i> for the issue.
	 Note: If there are multiple action notes for a customer, the <i>Customer Detail Exposure Report by Reason Code</i> lists just the first note.
Reason (Customer action reason code)	Alphanumeric, 40 positions; required. Identifies the reason behind the customer action note. Reason codes are defined in and validated against the Customer Action Reason Codes table; see <i>Working with Customer Action Reason Codes (WCAR)</i> . Alphanumeric, 2 positions; optional.
User	The user ID of the person who should follow up on or resolve the action issue. Alphanumeric, 10 positions, optional.
Status)	The current status of the issue. Valid status codes are: • <i>O</i> = Open; initial status of all action issues • <i>W</i> = Work in Process; issue investigated but not yet resolved. Select <i>Work in process</i> for the issue to view the details of the issue, update the user ID, and update the status to <i>W</i> (work in Process). • <i>R</i> = Resolved; issue resolved and closed. Select <i>Resolve</i> for the issue to update the status to <i>R</i> (resolved). Alphanumeric, 1 position; display-only, updated by the system.
Resolved (Date resolved)	The date when the customer action issue was resolved. The current date defaults when you select <i>Resolve</i> for an issue to close it. Numeric, 6 positions (in user date format); display-only, updated by the system.
D (Details; unlabeled field to the right of the Resolved field)	Identifies whether the customer action note provides a further description. Select <i>Detail notes</i> for an issue to view the details. Alphanumeric, 1 position; display-only.

Screen Option	Procedure
Create a note for an action issue	Enter a brief description of an issue on one of the lines available. Optionally, you can enter a reason code and the ID of the user assigned to follow up on the issue.
Delete an action issue	Select <i>Delete</i> for an issue to delete it. See Resolving or Deleting an Action Issue .
Display statistics for an action issue	Select <i>Display</i> for an issue to advance to the Display Customer Action screen. Each field on this screen is described under Edit Customer Actions Window and Work with Customer Action Notes Screen .
Update the status of an action issue to “work in process”	Select <i>Work in process</i> for an issue to set its status to <i>W</i> and advance to the Customer Action Note Details Screen .
Identify an issue as “resolved”	Select <i>Resolve</i> for an issue to “resolve” it. See Resolving or Deleting an Action Issue .
Enter detailed notes for an issue	Select <i>Detail notes</i> for an issue to advance to the Customer Action Note Details Screen .

Work with Email by Order Number Screen

Purpose: Use this screen to review emails associated with an order.

About emails: The Correspondence History table stores outbound and inbound emails related to an order, customer (including sold-to, ship-to, and bill-to customers), vendor or purchase order. You can associate an email with an order by indicating the order number when you forward the email into the system, or by specifying the order number at the [Change Email Screen](#). See [Email Repository Overview](#) for more information.

Outbound emails: The [Write Outbound Email to Email Repository \(H99\)](#) system control value controls whether to store header information for outbound email notifications, or for the *Outbound Email XML Message (CWEmailOut)* if specified for the notification type.

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



Note:

Shipment-related emails generated through the [Narvar Integration](#) are not displayed.

How to display this screen: Select Email for Order at the [Display More Options Screen](#).

Field	Description
Order #	A number identifying the order that you are currently reviewing or working with. The order ship-to number is separated by the order number with a semicolon (-). Order number: numeric, 8 positions; display-only. Order ship-to number: numeric, 3 positions; display-only.

Field	Description
Status	The status of the order. Possible statuses are: • Canceled • Held • Suspended • Closed • Open • Quote Alphanumeric, 10 positions; display-only.
Customer #	A number to identify the customer who placed the order, the customer's name, and the company name, if any. Customer number: numeric, 9 positions; display-only. Customer company and name: alphanumeric, 41 positions; display-only.
Create date	The date when the email was forwarded into the system, and the Correspondence History record was created. Numeric, 6 positions (in user date format); optional.
Email date	The date when the email was originally sent. Numeric, 6 positions (in user date format); optional.
Category	A category that you use to group email correspondence between you and your customers. A category of <i>NTF</i> indicates that the email was a notification generated by the system and sent to the customer. Alphanumeric, 3 positions; optional.
Source	Indicates whether the email was inbound or outbound. Valid values are: • <i>EXT</i> = the email was forwarded into Order Administration • <i>INT</i> = the email originated in Order Administration and was sent to a customer. A user-supplied code indicating the email's source is not currently implemented. Alphanumeric, 3 positions; optional.

Field	Description
Subject	The subject line of the email. • <i>Inbound emails:</i> Things to note: • When you forward an email into Order Administration, the system deletes FW : from the beginning of the subject line; however, if the email has been forwarded multiple times, only the first occurrence will be deleted. • The system renders the text of the subject line in all capital letters. • The subject line is truncated if it exceeds the maximum length of this field. • The system converts certain special characters. See Symbol and Special Character Conversion in Emails. The system deletes the email identifiers from the subject line if translation is successful. For example, a subject line reading FW : COMPANY=27;CUSTOMER=613;ATTACHMENT=N; Where is my order? would be translated to WHERE IS MY ORDER? Even if translation is successful, however, it does not necessarily mean that the email is assigned to a customer; it is possible for the email identifiers to be formatted correctly, but for the values specified to be incorrect or inconsistent. • <i>Outbound emails:</i> Possible subject lines for outbound email notifications include: • BACKORDER NOTIFICATION • CONTACT US NOTIFICATION • CREDIT CARD CREDIT ACKNOWLEDGEMENT • CREDIT CARD DECLINE NOTIFICATION • LOYALTY MEMBERSHIP-D • LOYALTY MEMBERSHIP-A • ORDER CONFIRMATION • ORDER UPDATE CONFIRMATION • Return Conf. - Order #99999999 • Ship Conf. - Order #99999999 • SOLDOUT CONFIRMATION • STORED VALUE CARD NOTIFICATION • QUOTE CONFIRMATION Summary information for an outbound email or <i>Outbound Email XML Message (CWEmailOut)</i> is stored only if the Write Outbound Email to Email Repository (H99) system control value is selected. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). See When Does the System Generate an Email Notification? for information on system-generated emails. To switch between displaying the subject line and the originating email address for the email, select <i>Subject/email address</i>. Alphanumeric, 78 positions; display-only.
Email address	The email address of the person who originated the email. To switch between displaying the subject line and the originating email address for the email, select <i>Subject/email address</i>. Alphanumeric, 50 positions; display-only.

Option	Procedure
Change the assignment of an email	Select <i>Change</i> for an email to advance to the Change Email Screen . The system confirms that your entries at this screen are consistent; see Identifying an Unrouted Email for more information.
 Note: The Changed Routed Email (B08) secured feature controls the ability to change an email assigned to an order number or customer. If you do not have authority to change a routed (assigned) email, you can select <i>Display</i> for an email to advance to the Display Email Screen, where you can review all of the same information.	
Delete an email	Select <i>Delete</i> for an email to delete it.
Display information about an email	Select <i>Display</i> for an email to advance to the Display Email Screen .
Create a tickler for the <i>MN</i> (manually created) tickler event	Select <i>Create Tickler</i> for an email to advance to the Create Tickler Screen .
 Note: To create a <i>MN</i> tickler, you must have authority to the Create Manual Tickler (B13) secured feature.	
Display email subject and text	Select <i>Display Detail</i> for an email to advance to the Display Email Screen .
Review all emails assigned to the sold-to customer	Select <i>W/W Email by Customer#</i> to advance to the Work with Email by Customer Sold To Number Screen .
Switch between displaying the subject line and the originating email address for the email	Select <i>Subject/Email Address</i> .

Work with Customer Profile Screen

Purpose: Use this screen to create or view the customer's demographic profile. This helps you gather as much information as possible about the customer, categorize the customer, target the customer for specific promotions or catalog mailings, and include the customer's name in customer lists you sell to other companies.

You define customer profile categories, such as age, income, or gender, and the valid values for each category through the Work with Profile Categories function. See [Setting Up Customer Profiles \(WPFL\)](#).

When you first advance to this screen for a customer: When you first advance to this screen for a customer for which you have not yet defined demographic data:

- If a default response has been defined for a profile category, the system defaults the response to the Data field.
- If a default response has not been defined for a profile category, the system leaves the Data field blank until you enter data for the field.

Order API: You can define demographic data for a customer on an order received through the *Generic Order Interface (Order API)*; see the *Profile* element in the *Inbound Order XML Message (CWORDERIN)*.

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

Inbound customer: You can define demographic data for a customer through the *Generic Customer API*; see the *CustProfile* element in the *Inbound Customer Message (CWCustmerIn)*.

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

How to display this screen:

- select a Customer Profile at the [Display More Options Screen](#);
- select *Profile* for a customer at a Work with Customer screen (see [Selecting Customers](#));
- select *Customer Profile* at the Create or Change Cust Sold To screen (see [Creating and Updating Sold-to Customers \(WCST\)](#)).

To auto-display this screen in order entry: The Work with Customer Profile screen opens automatically in order entry if you need to collect information in a demographic profile category flagged as mandatory for the sold to customer on the order. **Note:** If the [Alternate ID Required for Displaying Customer Profile \(K87\)](#) system control value is *selected*, the Work with Customer Profile screen opens automatically only if an alternate customer number is defined for the sold to customer on the order.

To auto-display this screen in order maintenance: The Work with Customer Profile screen opens automatically in order maintenance if the [Prompt for Mandatory Demographics in Order Maintenance \(E60\)](#) system control value is *selected*. **Note:** If the [Alternate ID Required for Displaying Customer Profile \(K87\)](#) system control value is *selected*, the Work with Customer Profile screen opens automatically only if an alternate customer number is defined for the sold to customer on the order.

Field	Description
Customer #	A number assigned by the system to identify the customer. Numeric, 9 positions; display-only, assigned by the system.
Customer name (unlabeled field to the right of Customer #)	The customer's last name, first name and middle initial. Last name: Alphanumeric, 25 positions; display-only. First name: Alphanumeric, 15 positions; display-only. Initial: Alphanumeric, 1 position; display-only.

Field	Description
Profile	A number used to identify a demographics category, such as gender, income, or geographic area. Demographic categories are defined through the Work with Profile Categories option; see dSetting Up Customer Profiles (WPFL). Numeric, 3 positions; display-only.
Description	Text associated with the demographics category, such as <i>Gender</i>, <i>Income</i>, or <i>Geographic Location</i>, etc. Alphanumeric, 20 positions; display-only.
Data	A valid response code for the demographics category. The current demographic data, if any, appears in the Data field; if you have not yet gathered the data from the customer, but you have assigned a default response for the category, then this value appears here. For example, if the category (in the Profile field) is <i>Gender</i>, you can enter or select the appropriate value for this customer, such as <i>Female</i>, <i>Male</i>, or <i>Unknown</i>. If you assign a default response for a profile category, then you will not be able to leave this category blank; the system will default the response back into the field when you select <i>OK</i>. Alphanumeric, 1 position.
Description	The description associated with the demographic data, such as <i>Male</i>, <i>Female</i>, or <i>Unknown</i>. Alphanumeric, 30 positions; display-only.
Mandatory	Indicates whether the profile category is mandatory. The system prompts you to collect a response for any category flagged as mandatory by advancing to this screen automatically when you select <i>Accept</i> or <i>Accept/Add Rcp.</i> to accept an order in order entry. You also advance to the screen automatically in order maintenance if the Prompt for Mandatory Demographics in Order Maintenance (E60) system control value is <i>selected</i>. If you have assigned a default response to a mandatory profile category, the Work with Customer Profile Screen does not display automatically; instead, the system assigns the default response to the customer in order entry or order maintenance if you have not already collected the data from the customer. Valid values are: • <i>Yes</i> = This is a mandatory profile category. • <i>No</i> = This is not a mandatory profile category.

Work with Email by Customer Sold To Number Screen

Purpose: Use this screen to review emails associated with a customer.

About emails: The Correspondence History table stores outbound and inbound emails related to an order, customer (including sold-to, ship-to, and bill-to customers), vendor or purchase order. You can associate an email with a customer by indicating the customer number when you forward the email into the system, or by specifying the customer number at the [Change Email Screen](#); also, the system can assign the email based on a matching email address. See [Email Repository Overview](#) for more information.

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

Outbound emails: The *Write Outbound Email to Email Repository (H99)* system control value controls whether to store header information for outbound email notifications, or for the *Outbound Email XML Message (CWEmailOut)* if specified for the notification type.

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

**Note:**

Shipment-related emails generated through the [Narvar Integration](#) are not displayed.

How to display this screen:

- Select Email for Customer Sold To at the [Display More Options Screen](#), or Customer Email Correspondence at the [More Customer Sold To Options Screen](#)
- Select *W/W Email by Customer#* at the [Work with Email by Order Number Screen](#)

Field	Description
Customer #	A number to identify the customer, the customer's name, and the company name, if any. Customer number: numeric, 9 positions; display-only. Customer company and name: alphanumeric, 41 positions; display-only.
Create date	The date when the email was forwarded into the system, and the Correspondence History record was created. Numeric, 6 positions (in user date format); optional.
Email date	The date when the email was originally sent. Numeric, 6 positions (in user date format); optional.
Category	A category that you use to group email correspondence between you and your customers. A category of <i>NTF</i> indicates that the email was a notification generated by the system and sent to the customer. Alphanumeric, 3 positions; optional.
Source	Indicates whether the email was inbound or outbound. Valid values are: • <i>EXT</i> = the email was forwarded into Order Administration • <i>INT</i> = the email originated in Order Administration and was sent to a customer. A user-supplied code indicating the email's source is not currently implemented. Alphanumeric, 3 positions; optional.

Field	Description
Subject	The subject line of the email. • <i>Inbound emails:</i> Things to note: • When you forward an email into Order Administration, the system deletes FW : from the beginning of the subject line; however, if the email has been forwarded multiple times, only the first occurrence will be deleted. • The system renders the text of the subject line in all capital letters. • The subject line is truncated if it exceeds the maximum length of this field. • The system converts certain special characters. See <i>Symbol and Special Character Conversion in Emails</i>. The system deletes the email identifiers from the subject line if translation is successful. For example, a subject line reading FW : COMPANY=27;CUSTOMER=613;ATTACHMENT=N; Where is my order? would be translated to WHERE IS MY ORDER? Even if translation is successful, however, it does not necessarily mean that the email is assigned to a customer; it is possible for the email identifiers to be formatted correctly, but for the values specified to be incorrect or inconsistent. • <i>Outbound emails:</i> Possible subject lines for outbound email notifications are: • BACKORDER NOTIFICATION • CONTACT US NOTIFICATION • CREDIT CARD CREDIT ACKNOWLEDGEMENT • CREDIT CARD DECLINE NOTIFICATION • LOYALTY MEMBERSHIP-D • LOYALTY MEMBERSHIP-A • ORDER CONFIRMATION • ORDER UPDATE CONFIRMATION • Return Conf. - Order #99999999 • Ship Conf. - Order #99999999 • SOLDOUT CONFIRMATION • STORED VALUE CARD NOTIFICATION • QUOTE CONFIRMATION Summary information for an outbound email or <i>Outbound Email XML Message (CWEmailOut)</i> is stored only if the <i>Write Outbound Email to Email Repository (H99)</i> system control value is <i>selected</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). See When Does the System Generate an Email Notification? for information on system-generated emails. To switch between displaying the subject line and the originating email address for the email, select <i>Subject/email address</i>. Alphanumeric, 78 positions; display-only.
Email address	The email address of the person who originated the email. To switch between displaying the subject line and the originating email address for the email, select <i>Subject/email address</i>. Alphanumeric, 50 positions; display-only.

Option	Procedure
Change the assignment of an email	Select <i>Change</i> for an email to advance to the <i>Change Email Screen</i> . The system confirms that your entries at this screen are consistent; see <i>Identifying an Unrouted Email</i> for more information.
 Note: The <i>Changed Routed Email (B08)</i> secured feature controls the ability to change an email assigned to a customer. If you do not have authority to change a routed (assigned) email, you can select <i>Display</i> for an email to advance to the <i>Display Email Screen</i>, where you can review all of the same information.	
Delete an email	Select <i>Delete</i> for an email to delete it.
Display information about an email	Select <i>Display</i> for an email to advance to the .
Create a tickler for the <i>MN</i> (manually created) tickler event	Select <i>Create Tickler</i> for an email to advance to the Create Tickler Screen .
 Note: To create a <i>MN</i> tickler, you must have authority to the <i>Create Manual Tickler (B13)</i> secured feature.	
Display email subject and text	Select <i>Display Detail</i> for an email to advance to the <i>Display Email Detail Screen</i>
Switch between displaying the subject line and the originating email address for the email	Select <i>Subject/Email Address</i> .

Option	Procedure
Advance to standard order inquiry	Select <i>Order Inquiry</i> for an email. If the email is associated with an order number, you advance to the Order Inquiry Header Screen or the Order Inquiry Detail Screen , depending on the setting of the <i>Default Version for Order Inquiry (C34)</i> system control value. If the email is not associated with an order number, you advance to the Order Inquiry Scan Screen .

**Note:**

This option is not available if you advanced to this screen through standard order inquiry.

Edit Customer Notes Screen

Purpose: Use this screen to enter, view, or delete informational messages about sold-to customers. You can view this information through several key areas in the system, such as order entry or Customer Maintenance.

You can create customer note types to display the note automatically in a pop-up window when you select this customer in order entry. You can also define text that defaults into the Note field when you select the note type. See [Working with Customer Note Types \(WNTY\)](#).

**Note:**

There is also a screen available to work with bill-to customer notes; see [Work with Bill To Notes Screen](#).

How to display this screen:

- Select *Customer Notes* at the [Display More Options Screen](#).
- select *Notes* for a customer on a Work with Customer screen (see [Selecting Customers](#)).
- select *Notes* at the first or second Create or Change Cust Sold To screen (see [Creating and Updating Sold-to Customers \(WCST\)](#)).
- select *Customer Notes* at the [Customer Selection Screen](#)

If you [Use Workflow Management \(H96\)](#):

- select *Notes* for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or [Workflow Management Screen](#) (tickler supervisor).
- select OK at the [Create Tickler Screen](#).
- select *Notes* at the [Change Tickler Screen](#) or Display Tickler Screen

Entering/editing notes: When you advance to this screen, the cursor is positioned at the first blank entry field. If the first screen is already filled with previously entered notes, press *Page Down* or select *Next* to advance to the first blank entry field. You can enter your new note.

To edit existing notes which are display-only, select *Add/Change Note* to switch the fields from display-only to editable fields.

Note sequence: The [Display Customer Notes in LIFO Sequence \(D55\)](#) system control value controls how customer notes are listed on the screen. If you select this value, the notes display in reverse chronological order (most recent first). If you deselect this value, the notes display in chronological order.

Address changes: The system writes a message to the Customer Note table each time you enter a change to a sold-to or permanent ship-to customer's name, address or phone number. The messages for a ship-to customer change are stored with the sold-to customer messages. See [Reviewing Customer Address Changes](#).

Membership cancellations: The system writes a message, such as `Memship Cancel Conf to ejohnson@example.com.` to the Customer Note table when you cancel a customer membership and generate the membership cancellation notification email. The note is written even if the system generates the *Outbound Email XML Message (CWEmailOut)* rather than an actual message, or if the email cannot be relayed if, for example, there is a problem with the destination email address. For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1). See the [Membership Cancellation Email Program \(K77\)](#) for an overview on membership cancellation emails

Field	Description
Customer (Sold-to customer number)	A number assigned by the system to identify the customer. Numeric, 9 positions; display-only, assigned by the system.
Customer name (unlabeled field to the right of Customer #)	The customer's company, and/or last name, first name and middle initial. Company: alphanumeric, 30 positions; display-only. Last name: alphanumeric, 25 positions; display-only. First name: alphanumeric, 15 positions; display-only. Initial: Alphanumeric, 1 position; display-only.
Notes	Fields where you can view, enter, or delete customer notes. The existing notes fields are display-only when you advance to the screen. The cursor is positioned at the first blank entry field. If the first screen is already filled with previously entered notes, select <i>Next</i> or press <i>Page Down</i> until you reach the first enterable field. If you need extra space, use <i>Scroll</i> or <i>Page Down</i> to display additional entry fields. To edit existing notes, select <i>Add/Change Note</i> to switch the display-only fields to editable fields. Alphanumeric, 60 positions per line.
Type	The type of customer note. You can use the Work with Customer Note Type menu option to define note types, and set up note types to display automatically in a pop-up window in order entry or order maintenance. You can also define text that will default into the Notes field. This text will default only if you have not already made an entry in that note line, and you can override any default. See Working with Customer Note Types (WNTY) . This field is display-only when you first advance to the screen. Select <i>Cust. Note Type</i> to make it enterable. Alphanumeric, 1 position; optional or display-only.

Field	Description
User (User Id)	A code that identifies the person who entered the customer notes or who performed the activity (such as changing an address or cancelling a customer membership) that produced the note. If there is more than one note by the same user on the same date, the user ID and date are displayed just once. Alphanumeric, 10 positions; display-only.
Date	The date when the customer notes were entered. If there is more than one note by the same user on the same date, the user ID and date are displayed just once. Numeric, 6 positions (in user date format); display-only, updated by the system.

Screen Option	Procedure
Enter a new customer note	Begin typing at the first available Note field. You may need to press <i>Page Down</i> until you reach the first enterable field. Press <i>Tab</i> to advance from line to line, and select <i>OK</i> when you are done.
Add or change an existing note	Press <i>F7</i> to toggle <i>Add/Change Note</i> to edit an existing note. Press <i>Tab</i> to advance from line to line, and select <i>OK</i> when you are done.
Make the Type field enterable or switch it back to display-only	Select <i>Cust. Note Type</i> .

Work with Email by Customer Ship To Number Screen

Purpose: Use this screen to review emails associated with a ship-to customer.

About emails: The Correspondence History table stores outbound and inbound emails related to an order, customer (including sold-to, ship-to, and bill-to customers), vendor or purchase order. You can associate an email with a ship-to customer by indicating the sold-to and ship-to customer numbers when you forward the email into the system, or by specifying these numbers at the *Change Email Screen*; also, the system can assign the email based on a matching email address. See *Email Repository Overview* for more information.

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

Outbound emails: The *Write Outbound Email to Email Repository (H99)* system control value controls whether to store header information for outbound email notifications, or for the *Outbound Email XML Message (CWEmailOut)* if specified for the notification type.

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



Note:

Shipment-related emails generated through the [Narvar Integration](#) are not displayed.

How to display this screen: Select Email for Customer Ship To at the [Display More Options Screen](#). You can also display this screen by selecting *Email history* for a ship-to customer at the [Work with Customer Ship Tos Screen](#).

Field	Description
Customer #	A number to identify the customer, the customer's name, and the company name, if any. Customer number: numeric, 9 positions; display-only. Customer company and name: alphanumeric, 41 positions; display-only.
Ship to #	A number to identify a permanent shipping address associated with a sold-to customer. The ship-to customer name is to the right. Numeric, 3 positions; optional.
Create date	The date when the email was forwarded into the system, and the Correspondence History record was created. Numeric, 6 positions (in user date format); optional.
Email date	The date when the email was originally sent. Numeric, 6 positions (in user date format); optional.
Category	A category that you use to group email correspondence between you and your customers. A category of <i>NTF</i> indicates that the email was a notification generated by the system and sent to the customer. Alphanumeric, 3 positions; optional.
Source	Indicates whether the email was inbound or outbound. Valid values are: <i>EXT</i> = the email was forwarded into Order Administration <i>INT</i> = the email originated in Order Administration and was sent to a customer. A user-supplied code indicating the email's source is not currently implemented. Alphanumeric, 3 positions; optional.
Subject	The subject line of the email. <i>Inbound emails:</i> Things to note: - When you forward an email into Order Administration, the system deletes FW: from the beginning of the subject line; however, if the email has been forwarded multiple times, only the first occurrence will be deleted. - The system renders the text of the subject line in all capital letters. - The subject line is truncated if it exceeds the maximum length of this field. - The system converts certain special characters. See <i>Symbol and Special Character Conversion in Emails</i>. The system deletes the email identifiers from the subject line if translation is successful. For example, a subject line reading FW: COMPANY=27;CUSTOMER=613;ATTACHMENT=N; Where is my order? would be translated to WHERE IS MY ORDER? Even if translation is successful, however, it does not necessarily mean that the email is assigned to a customer; it is possible for the email identifiers to be formatted correctly, but for the values specified to be incorrect or inconsistent.

Field	Description
	• <i>Outbound emails:</i> Possible subject lines for outbound email notifications are: • BACKORDER NOTIFICATION • CONTACT US NOTIFICATION • CREDIT CARD CREDIT ACKNOWLEDGEMENT • CREDIT CARD DECLINE NOTIFICATION • LOYALTY MEMBERSHIP-D • LOYALTY MEMBERSHIP-A • ORDER CONFIRMATION • ORDER UPDATE CONFIRMATION • Return Conf. - Order #99999999 • Ship Conf. - Order #99999999 • SOLDOUT CONFIRMATION • STORED VALUE CARD NOTIFICATION Summary information for an outbound email or <i>Outbound Email XML Message (CWEmailOut)</i> is stored only if the <i>Write Outbound Email to Email Repository (H99)</i> system control value is selected. See <i>When Does the System Generate an Email Notification?</i> for information on system-generated emails. To switch between displaying the subject line and the originating email address for the email, select <i>Subject/email address</i>. Alphanumeric, 78 positions; display-only.
Email address	The email address of the person who originated the email. To switch between displaying the subject line and the originating email address for the email, select <i>Subject/email address</i>. Alphanumeric, 50 positions; display-only.

Option	Procedure
Change the assignment of an email	Select <i>Change</i> for an email to advance to the <i>Change Email Screen</i> . The system confirms that your entries at this screen are consistent; see <i>Identifying an Unrouted Email</i> for more information.

 Note:

The *Changed Routed Email (B08)* secured feature controls the ability to change an email assigned to a customer. If you do not have authority to change a routed (assigned) email, you can select *Display* for an email to advance to the *Display Email Screen*, where you can review all of the same information.

Option	Procedure
Delete an email	Select <i>Delete</i> for an email to delete it.
Display information about an email	Select <i>Display</i> for an email to advance to the <i>Display Email Screen</i> .
Create a tickler for the <i>MN</i> (manually created) tickler event	Select <i>Create tickler</i> for an email to advance to the <i>Create Tickler Screen</i> .
 Note: To create a <i>MN</i> tickler, you must have authority to the <i>Create Manual Tickler (B13)</i> secured feature.	
Display email subject and text	Select <i>Display detail</i> for an email to advance to the <i>Display Email Detail Screen</i> .
Switch between displaying the subject line and the originating email address for the email	Select <i>Subject/email address</i> .
Advance to order inquiry	Select <i>Order inquiry</i> for an email. If the email is associated with an order number, you advance to the <i>Order Inquiry Header Screen</i> or the <i>Order Inquiry Detail Screen</i> , depending on the setting of the <i>Default Version for Order Inquiry (C34)</i> system control value. If the email is not associated with an order number, you advance to the <i>Order Inquiry Scan Screen</i> .
 Note: This option is not available if you advanced to this screen through order inquiry.	

Work with Email by Customer Bill To Number Screen

Purpose: Use this screen to review emails associated with a bill-to customer.

About emails: The Correspondence History table stores outbound and inbound emails related to an order, customer (including sold-to, ship-to, and bill-to customers), vendor or purchase order. You can associate an email with a bill-to customer by indicating the bill-to customer number when you forward the email into the system, or by specifying the bill-to customer at the *Change Email Screen*; also, the system can assign the email based on a matching email address. See *Email Repository Overview* for more information.

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

Outbound emails: The *Write Outbound Email to Email Repository (H99)* system control value controls whether to store header information for outbound email notifications, or for the *Outbound Email XML Message (CWEmailOut)* if specified for the notification type.

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

**Note:**

Shipment-related emails generated through the [Narvar Integration](#) are not displayed.

How to display this screen: Select Email for Customer Bill To at the [Display More Options Screen](#). You can also display this screen by selecting *Email history* for a bill-to customer at the *Work with Bill To Customers Screen*.

Field	Description
Customer bill to #	A number identifying a customer responsible for payment on an order. Validated against the Customer Bill To table. The bill-to customer's name appears to the right. Bill-to number: numeric, 7 positions; display-only. Bill-to name: alphanumeric, 41 positions; display-only.
Create date	The date when the email was forwarded into the system, and the Correspondence History record was created. Numeric, 6 positions (in user date format); optional.
Email date	The date when the email was originally sent. Numeric, 6 positions (in user date format); optional.
Category	A category that you use to group email correspondence between you and your customers. A category of <i>NTF</i> indicates that the email was a notification generated by the system and sent to the customer. Alphanumeric, 3 positions; optional.
Source	Indicates whether the email was inbound or outbound. Valid values are: <i>EXT</i> = the email was forwarded into Order Administration <i>INT</i> = the email originated in Order Administration and was sent to a customer. A user-supplied code indicating the email's source is not currently implemented. Alphanumeric, 3 positions; optional.

Field	Description
Subject	The subject line of the email. • <i>Inbound emails:</i> Things to note: • When you forward an email into Order Administration, the system deletes FW : from the beginning of the subject line; however, if the email has been forwarded multiple times, only the first occurrence will be deleted. • The system renders the text of the subject line in all capital letters. • The subject line is truncated if it exceeds the maximum length of this field. • The system converts certain special characters. See <i>Symbol and Special Character Conversion in Emails</i>. The system deletes the email identifiers from the subject line if translation is successful. For example, a subject line reading FW : COMPANY=27;CUSTOMER=613;ATTACHMENT=N; Where is my order? would be translated to WHERE IS MY ORDER? Even if translation is successful, however, it does not necessarily mean that the email is assigned to a customer; it is possible for the email identifiers to be formatted correctly, but for the values specified to be incorrect or inconsistent. • <i>Outbound emails:</i> Possible subject lines for outbound email notifications are: • BACKORDER NOTIFICATION • CONTACT US NOTIFICATION • CREDIT CARD CREDIT ACKNOWLEDGEMENT • CREDIT CARD DECLINE NOTIFICATION • LOYALTY MEMBERSHIP-D • LOYALTY MEMBERSHIP-A • ORDER CONFIRMATION • ORDER UPDATE CONFIRMATION • Return Conf. - Order #99999999 • Ship Conf. - Order #99999999 • SOLDOUT CONFIRMATION • STORED VALUE CARD NOTIFICATION • QUOTE CONFIRMATION Summary information for an outbound email or <i>Outbound Email XML Message (CWEmailOut)</i> is stored only if the <i>Write Outbound Email to Email Repository (H99)</i> system control value is <i>selected</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). See <i>When Does the System Generate an Email Notification?</i> for information on system-generated emails. To switch between displaying the subject line and the originating email address for the email, select <i>Subject/email address</i>. Alphanumeric, 78 positions; display-only.
Email address	The email address of the person who originated the email. To switch between displaying the subject line and the originating email address for the email, select <i>Subject/email address</i>. Alphanumeric, 50 positions; display-only.

Option	Procedure
Change the assignment of an email	Select <i>Change</i> for an email to advance to the <i>Change Email Screen</i>. The system confirms that your entries at this screen are consistent; see <i>Identifying an Unrouted Email</i> for more information.  Note: The <i>Changed Routed Email (B08)</i> secured feature controls the ability to change an email assigned to a customer. If you do not have authority to change a routed (assigned) email, you can select <i>Display</i> for an email to advance to the <i>Display Email Screen</i>, where you can review all of the same information.
Delete an email	Select <i>Delete</i> for an email to delete it.
Display information about an email	Select <i>Display</i> for an email to advance to the <i>Display Email Screen</i>
Create a tickler for the <i>MN</i> (manually created) tickler event	Select <i>Create tickler</i> for an email to advance to the <i>Create Tickler Screen</i> .
	 Note: To create a <i>MN</i> tickler, you must have authority to the <i>Create Manual Tickler (B13)</i> secured feature.
Display email subject and text	Select <i>Display detail</i> for an email to advance to the <i>Display Email Detail Screen</i> .
Switch between displaying the subject line and the originating email address for the email	Select <i>Subject/email address</i> .

Option	Procedure
Advance to order inquiry	Select <i>Order inquiry</i> for an email. If the email is associated with an order number, you advance to the Order Inquiry Header Screen or the Order Inquiry Detail Screen , depending on the setting of the <i>Default Version for Order Inquiry (C34)</i> system control value. If the email is not associated with an order number, you advance to the Order Inquiry Scan Screen .

 Note:

This option is not available if you advanced to this screen through order inquiry.

Display Pick Tickets for Order Screen

Purpose: Through standard order inquiry or order entry/maintenance, you can display the Pick Slip Generation Inquiry screens. Use these screens to review picks for the order you are working with.

How to display this screen: Select the Display Picks option at the [Display More Options Screen](#).

Field	Description
Ship to #	A number to identify the shipping address on the order. Numeric, 3 positions; optional.
Pick # (Pick control number)	The control number for this pick. Numeric, 7 positions; optional, assigned by the system.
Printed	The date the pick slip was printed. Numeric, 6 positions (in user date format); display-only.
Confirmed	The date the items on the pick slip were shipped and billed. Numeric, 6 positions (in user date format); display-only.

Field	Description
Status	The status of the pick slip. Valid statuses are: • Open • Generated No Authorization • Generated Has Authorization • Submitted to Async • Billing Pending • Confirmed • Declined Authorization • Async Processing Error • Manifest Submission • Packed • Reprinted • Suspended • Voided • Waiting for Authorization • Authorized Display-only; updated by system.
Reprint	The pick control number that has been reprinted. Numeric, 7 positions; display-only.

Screen Option	Procedure
Display pick control header information	Select <i>Display</i> for a pick slip to advance to the Display Pick Control Header (1 of 2) Screen .
Display pick details	Select <i>Details</i> for a pick slip to advance to the Work with Pick Details Screen .

Display Order Totals Window

Purpose: Use this window to review the total charges across all shipping addresses on an order, which is the initial order plus any recipient orders.

A recipient order is an order that is placed by and paid by a customer, but will ship to another address.

This window provides some basic order information (order number, number of recipients, prepaid amount, and current order balance), and breaks out the order charges by individual charge, namely:

- Merchandise
- Freight
- Additional freight
- Tax
- Handling
- Additional charges

The individual order charges for each recipient order “roll up” to this screen and are summarized in the Total bucket. This allows you to determine the total amount the customer will be charged.

The system updates this window as the customer places additional recipient orders. The system updates the Order Totals fields as you change any single order by adding or deleting items on an order or as you add additional recipient orders. Initially, the fields on the Order Totals pop-up window are blank, but are updated automatically as you enter the order.

How to display this screen: Select for Ord Totals (All Recips) at the [Display More Options Screen](#).

This window differs from the running order totals on the order entry screens because it represents the accumulated totals for all shipping addresses on the order. The totals on the individual orders, however, represent the totals for the current order only.

About recipient orders: The Order Totals window accumulates the totals for the original order and any additional orders with different shipping addresses entered using *Accept/Add Rcp*.

Recipient orders use the same order number; however, the suffix attached to the Order# field indicates an alternate shipping address -- signifying a recipient order. For example, the original order is order# 1255 - 1. The system adds "- 1" to the order number to indicate the number of shipping addresses. The shipping number increases by 1 with each additional order you place.

Still using the example above, the system assigns order# 1255 - 2 to the order with a different shipping address. As a result, the system groups all related orders under the same order number, but creates separate order records for historical and order management purposes.

Field	Description
Order#	A unique number assigned by the system to identify an order. Numeric, 8 positions; display-only, assigned by the system.
# of recipients	The number of shipping addresses on the current order. Each shipping address represents a recipient, which is the person or company for whom an order is placed. For example, when a customer places an order for herself only, there is one shipping address on the order and only one recipient. However, if the customer places an order for herself and for another person there are 2 recipients on this order -- the initial order plus a "related" orders. The initial order always is recipient number 1. You may add up to 999 recipients to an order.

 Note:

The ship-to suffix (in an unlabeled field to the right of the Order# field) is initially set to 1 to indicate the first recipient order; the system increments this field by a 1 for each additional recipient order entered using *Accept/Add Rcp*.

Numeric, 3 positions; display-only, updated by the system.

Field	Description
Merchandise	The total value of merchandise across all recipient orders, which is the item price multiplied by the quantity ordered. This total does not include freight, additional charges (such as gift wrap or special handling), tax, or handling. The system updates this field as items are added to or canceled from each order. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Freight	The total charge for shipping all orders. The system performs this calculation based on the freight method defined for the source code on the each order. This total may depend on the quantity or weight of items ordered or on the order as a whole. The system updates this field as items are added to or canceled from each order. This field does not include any additional charges associated with shipping this item (see the Additional Freight field for these totals). Shipping charges will not be included in the order totals (and the Freight field will be blank) if the Calc freight field on all recipient orders is <i>unselected</i> to indicate that freight will not be calculated for these orders. Working with Offers (WOFR) discusses each freight method and freight calculation. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Additional freight	The total dollar amount for additional freight charges on all orders, above and beyond the regular shipping charges. <i>Additional freight charges for shipper</i> Additional freight charges for a shipper are defined in the ship via record. For example, additional shipping charges may be added to an order being delivered by an overnight shipper. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Tax	The total sales tax on all recipient orders. The value in the Tax field is based on the value of the merchandise on the order, and may also include tax on freight and handling. Tax is not accumulated in the Tax field on orders subject to VAT; instead, a hidden tax is included in the order detail line. See the description of the Tax Included in Price (E70) system control value. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.

Field	Description
Handling	The total charge for gift wrapping or special handling. <i>What is special handling?</i> Special handling is any type of item personalization, such as monogramming, alterations, engraving, etc. The SKU/Offer record controls whether the item may be personalized and defines the special handling charge if special handling is allowed. <i>Can any item be gift wrapped?</i> The SKU/Offer record controls whether an item may be gift wrapped and defines the gift wrapping charge if gift wrapping is allowed. This field will be blank if none of the items on the order will be gift wrapped or personalized. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Additional charges	The total extra charges added to each recipient order.



Note:

Another type of additional charge is a credit that may be added to the order during order maintenance.

Additional charges may be added to the order in a variety of ways, for a variety of reasons, including:

1. An additional service charge defined for the source code, based on the dollar value of merchandise on the order.
2. An additional shipping charge defined for the item in the Shipper/Item record.
3. An additional charge entered manually through *Charges*.

Each type of additional charge is described briefly below.

Source code additional charges

An additional charge may be added to an order, depending on whether service charges have been defined for the source code. In this case, a record exists in the service charges table for the source code. The system will add an additional charge to the order based on the total dollar value of merchandise.

Shipper/item additional charges

An additional charge may be defined for an item, depending on the shipper you select to deliver the item.

For example, a special shipper/item record may exist for a desk when it will be delivered by Sample Shippers. Usually, Sample Shippers charges \$8.50 to deliver most items, but, because the desk is oversized and heavy, the customer will be charged \$25.00 for delivery.

A record exists on the system in the Shipper/Item table that specifies this information. The \$25.00 additional shipping charge will be added to the order automatically in the Additional charges field when the customer orders the desk and requests delivery through Sample Shippers.

Field	Description
	<i>Manually entered additional charges</i> You may add any type of additional charge to an order by selecting <i>Charges</i>. A pop-up window appears for you to select an additional charge code and specify the additional charge. This allows you to add additional charges to an order at any time. Additional charges are defined in and validated against the Additional Charges table; see Establishing Additional Charge Codes (WADC). You may define additional charge codes for any reason, such as a store-restocking fee, duty fee, long- distance telephone charges, etc. This field will be blank if no additional charges exist on any order. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Total	The sum of all charges for all recipient orders, including: merchandise, freight, additional freight, tax, handling, and additional charges. This is the amount that the customer owes for the entire order. The order total will be adjusted by the system if the order or customer is eligible for any discounts. The system increases or decreases the order totals as orders are added or changed. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Prepaid amount	The total dollar amount prepaid on the order by the customer on check. This field is blank if no prepayment was received or if the customer will pay by credit card. This is the grand total of all prepayments for each recipient order, because you must define a method of payment for each order placed. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.
Balance	The balance due for all recipient orders, calculated by subtracting the value in the Prepaid amount field from the value in the Total field. <i>A zero balance?</i> If the balance is zero: • the customer has prepaid for all recipient orders and there is no balance due from the customer, OR • the order represents a pre-order quote and not a regular order; see Entering Pre-Order Quotes. <i>A negative balance?</i> If the balance is negative (such as 54.99-), there is a balance due on the order that will be charged to the customer's credit card. <i>A positive balance?</i> If the balance is positive, the customer has overpaid on the prepayment amount with a check. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.

The status of the order in relation to the balance is:

Balance	Why?	The next step is...
Zero	- The customer has prepaid for all recipient orders with a check, OR - The order represents a pre-order quote and not a regular order; see Entering Pre-Order Quotes	- The customer has paid what was owed. No further activity required, OR - At the customer's request, convert the quote to a regular order; see Converting Quotes to Orders.
Negative	The customer has not prepaid all or part of the order. The customer owes you money (balance due).	Charge the customer's credit card.
Positive	The customer has overpaid for all recipient orders. You owe the customer some type of credit.	Credit the customer's account the overpayment amount. The type of credit issued is determined by the payment type used on the order or the value in the Alt refund type field in the Pay Type table if you cannot credit the original pay type. Ultimately, the system determines how you will credit the customer for the overpayment.

Work with Subscriptions Screen

Purpose: Use this screen to view the subscription items ordered by a customer. The system adds a record to this table automatically when you generate a pick slip for a subscription item. This table provides the required information to fulfill or modify the customer's subscription.

This option is not available in order entry or maintenance, only standard order inquiry.

Definition: A subscription item is:

- identified by a *selected* Subscription field in the Item record
- defined as a non-inventory item in the Item record (*selected* Non-inv field)
- defined further in the Item Subscription table in terms of the current issue, frequency of issues, etc.
- express billed (the entire amount) and closed immediately by the system when you generate a pick slip for the order

For more information: For more information on generating an extract file of customers to receive subscriptions, or on purging this file, see [Processing and Purging Subscriptions](#).

How to display this screen: At the [Display More Options Screen](#), *Select* for the Subscriptions option. You can also display this screen by selecting *Subscriptions* for a customer on any Work with Customers screen (see [Selecting Customers](#)), or selecting *Subscriptions* at the Change Customer or Create Customer screen (see [Creating and Updating Sold-to Customers \(WCST\)](#)).

Field	Description
Customer #	A number to identify the customer receiving the subscription. Numeric, 9 positions; display-only, assigned by the system.
Customer name (Unlabeled field to the right of the customer number)	The name of the customer receiving the subscription. Alphanumeric, 41 positions; display-only.

Field	Description
S (Status)	The status of the subscription. Valid values include: • <i>Cancelled</i> = changed to this status when the operator cancels the subscription using option 4 on the Work with Subscriptions screen.

Note:

Canceling the order detail line containing the subscription item does not update the status of the subscription item to *Cancelled*; you must manually update the status by using option #4 to cancel. Additionally, if you use an outside service to fulfill your subscriptions, you must notify them of any cancellations to active subscriptions.

- *Closed* = Expired; automatically updated to this status when expiring issue = last issue sent. If this subscription was included in a subscription extract file you generated using Select All Open Subscriptions, the status of the subscription will be *Closed*. See [Generating the Subscription Extract Table \(WGSE\)](#).
- *Open*
- *Purged*

Updated by the system.

Customer Order Item History Screen

Purpose: Use this screen to review items that a customer has previously ordered.

How to display this screen: Select *Customer Order Item History* at the [Display More Options Screen](#), or select *Cust Item History* at the [Customer Selection Screen](#).

Initial display: The Customer Order Item History screen displays items ordered by the customer in reverse chronological order based on entered date.

Field	Description
Sold To	The number that identifies the customer who placed the order, and the customer's first name, last name, and middle initial. If the customer does not have a last name, then the company name is displayed. This is the sold-to customer on the current order, if you advanced to this screen from standard order inquiry; otherwise, it is the customer you are currently reviewing at the Customer Selection Screen. Sold to number: Numeric, 9 positions; display-only. Sold to name: Alphanumeric, 41 positions (last name, first name middle initial format); display-only. Sold to company: Alphanumeric, 30 positions; display-only.

Field	Description
Date	The date when the item was added to the order, if the item was added after initial order entry, such as through an exchange; otherwise, this is the same as the entered date for the order. Enter a valid date and select <i>OK</i> to review items ordered on that date. Numeric, 6 positions (in user date format); optional.
Item	The code identifying the item ordered.
	 Note: Place your cursor over the Item code to display the item description.
	Enter a full or partial item code and select <i>OK</i> to review items whose item code begins with your entry. Alphanumeric, 12 positions; optional.
Colr Size Othr	The SKU elements that further identify an item, such as its color or size. Enter a full or partial SKU and select <i>OK</i> to review items whose SKU code contains your entry. Alphanumeric, three 4-position fields; optional.
Order #	A unique number assigned by the system to identify the order. Numeric, 8 positions; display-only.
Ship To #	The number identifying the shipping address for the order. A number greater than one indicates that the order has multiple shipping addresses. Numeric, 3 positions; display-only.
Sts	The status of the line on the order. Possible statuses are: • <i>X</i> = Closed. The item was shipped, or cancelled with a cancel reason code flagged to reduce demand. This status can also indicate a return that was created by entering a negative quantity, rather than by processing a return against a shipped order line. • <i>B</i> = Billing or Express Bill. An express-bill order has been submitted to the billing async job, which has not yet processed the record. • <i>C</i> = Canceled. The item was canceled using a cancel reason that was not flagged to reduce demand. • <i>H</i> = Held. The item (but not necessarily the order) was put on hold to prevent printing it on a pick slip. • <i>S</i> = Sold Out. The line item was sold out, either by an operator or automatically by the system. • <i>E</i> = Error. You received the order through the order API, and there are one or more errors related to the item. In this case, the order is suspended until you fix the error(s). • Blank = the line is open. An open line might be partially or fully backordered, or have had a partial shipment or cancellation take place. Alphanumeric, 1 position; display-only.

Field	Description
Price	The single-unit price of the item, after applying all discounts and repricing. The item price does not include other charges on the order such as freight, tax, handling, or additional charges.
	 Note: If the item was added at no charge, such as a free gift or a component of a set, the Price field is blank.
Qty Ordered	Numeric, 13 positions with a 2-place decimal; display-only. The total number of units of the item ordered. A minus sign indicates a return created by entering a negative quantity in order entry. This field is blank when you cancel a line using a cancel reason flagged to reduce demand.
Qty Shipped	Numeric, 5 positions; display-only. The total number of units of the item that have been shipped. A minus sign indicates a return created by entering a negative quantity in order entry.
Qty Returned	Numeric, 5 positions; display-only. The total number of units of the item returned or exchanged. This field is blank for a return created by entering a negative quantity in order entry. This field is updated when the return is received.
Ship Date	Numeric, 5 positions; display-only. The most recent ship date for the item. If the line has more than one shipment date because of multiple shipments, the most recent shipment date is displayed. This situation might occur if there was a backordered quantity which you were later able to ship, or because the order line was for more than one unit but the item is flagged as “ship alone” (indicating that each unit must ship separately). Numeric, 7 positions; display-only.

Brokered Backorder Summary Screen

Purpose: Use this screen to review the status of all brokered backordered lines on the order.

How to display this screen: Select *Brokered Backorder Summary* at the [Display More Options Screen](#). This option is available only if the order includes any brokered backordered lines.

For more information: See [Brokered Backorders](#) for more information on brokered backorders.

Field	Description
Order #	The order number and ship-to number that you are currently reviewing. Order number: numeric, 8 positions; display-only. Ship-to number: numeric, 3 positions; display-only.

Field	Description
Status	The current status of the Order Orchestration request. The description is to the right, separated by a hyphen (-). See the Fulfillment Process: After Order Creation and Status Updates for a discussion of possible statuses. Status code: alphanumeric, 1 position; display-only. Status description: alphanumeric; display-only.
Line #	The sequence number in the Order Detail table that identifies the order line to be fulfilled through the Order Orchestration integration. The sequence number might differ from the order line number displayed in order maintenance or order inquiry if, for example, you deleted or canceled one of the previous lines on the order. Numeric, 5 positions; display-only.
Item/SKU	The item and SKU fulfilled through the Order Orchestration integration. Item: alphanumeric, 12 positions; display-only. SKU: alphanumeric, three 4-position fields; display-only.
Qty	The quantity of a brokered backorder line that is currently assigned to Order Orchestration for fulfillment, or that has been fulfilled or canceled. Numeric, 5 positions; display-only.
Fulfilling Location	The location selected by Order Orchestration to fulfill the brokered backorder. See the Order Orchestration Originating Location, Fulfilling Location, and Pickup Location for a discussion, including information on when the location might be blank. Alphanumeric, 50 positions; display-only.
Request ID	A unique ID number assigned by Order Orchestration to identify the order. If the Use Split Order (L56) system control value is: <i>unselected</i>: each individual brokered backorder item submitted to Order Orchestration receives a unique request ID, and Order Orchestration treats it as a separate order. <i>selected</i>: Order Administration sends a single submit order request for all backordered lines that are eligible for brokering. The request ID is blank for requests whose status is: <i>Z: Canceled</i> <i>C: Closed</i> <i>J: Rejected</i> <i>R: Ready</i> <i>W: Waiting</i> The field might also be blank for requests in <i>E: Error</i> status, depending on the nature of the error. For example, requests that Order Orchestration did not receive and create successfully are not assigned request ID's. Numeric, 30 positions; display-only.

Option	Procedure
Review details about an Order Orchestration request	Select <i>Display</i> for a record to advance to the Display Order Broker Screen .
Review history for an Order Orchestration request	Select <i>History</i> for a record to advance to the Display Order Broker History Screen .

Purchase Order Layering

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

When to run purchase order layering: It is important to run this function before you generate backorder notices or run any other function that relies on accurate purchase order date and quantity information. You can run Purchase Order Layering on demand at any time.



Note:

When you run purchase order layering, the system clears the PO Layering table and rebuilds it based on the purchase order records that are uploaded to the table. In order to ensure accurate updates, you must upload the PO Layering table with ALL open purchase orders every time you perform an upload.

Instructions: Follow these steps to update purchase order layering.

#	Step
1	Upload the most recent purchase order information to the PO Layering table: - Use the File Storage API to upload a POLAYR text file to the FILE_STORAGE table, and then run the UPPOLAY Upload PO Layering File (Program name PFR0134, Parameter POLAYR) periodic function to update the PO Layering table, or Use the Work with File Uploads (WUPL) menu option to upload the text file and update the PO Layering table. PO Layering Table (POLAYR) The PO Layering table contains the following fields: - Company (numeric, 3 positions) - Item number (alphanumeric, 12 positions) - SKU code (alphanumeric, 14 positions) - Warehouse (numeric, 3 positions) - PO number (numeric, 7 positions) - Sequence number (numeric, 5 positions) - Due date (numeric, 7 positions) - Open quantity (numeric, 7 positions) - Status (alphanumeric, 16 positions) - Reference number (alphanumeric, 15 positions) You can use the following sample data to create a PO Layering upload file: <pre>7 RF123SKU4567 ROSE XSML WMNS 4 53 1 1080915 20 Ref#</pre>
	 Note: - To leave any field in the upload file blank, pass a space in an alphanumeric field and a 0 in a numeric field so that the file can be processed without errors. Leaving a field with no space or 0 is interpreted as null in the database and causes errors. - If you run the UPPOLAY periodic function and a POLAYR file is not in the folder defined in the CWDIRECTCP_UPLOAD_DIRECTORY property, the system writes an error that you can review in Work with File Uploads (WUPL). The error indicates that the process could not complete because the POLAYR file was not found in the upload folder.
2	Once the records are uploaded to the PO Layering table, the process uses the newly uploaded records to update the due date and backorder quantity for order lines on backorder. This update occurs for all companies and all warehouses for which there is an entry in the PO Layering table. Errors: If an error occurs during the upload, the system clears the file and does not update the due date and backorder quantity for order lines on backorder.

**Note:**

The system does not update records in the PO layering table when you change an item on backorder (such as deleting, rejecting, or canceling an order line on backorder). In this situation, you must perform a PO Layering Upload again to make sure the information in the PO Layering table is correct.

The following records are in the PO Layering table for item ABC:

Update PO Layering Example

PO#	Due Date	Open Qty
100	January 1	2
115	February 1	50

You place the following orders for item ABC:

Order#	Order Qty	Results
1010	1	The system: - decreases the Open Qty for PO# 100 in the PO Layering table to 1. - assigns an expected date of January 1 to the order line.
1012	2	The system: - decreases the Open Qty for PO# 100 in the PO Layering table to 0 and updates its status to C (Closed). - decreases the Open Qty for PO# 115 in the PO Layering table to 49. - assigns an expected date of February 1 to the order line.
1015	1	The system: - decreases the Open Qty for PO# 115 in the PO Layering table to 48. - assigns an expected date of February 1 to the order line.

You cancel order 1010, freeing up 1 unit of item ABC on purchase order 100. However, the system does not reevaluate the expected date assigned to the open orders for item ABC until you upload the PO Layering table with the most recent purchase order information in your external system.

You upload the most recent purchase order information in your external system to the PO Layering table. The following records are now in the PO Layering table for item ABC:

PO#	Due Date	Open Qty
100	January 1	2
115	February 1	50
129	February 15	50

The system updates the expected date for the open orders that contain item ABC based on the records in the PO Layering table:

Order#	Order Qty	Updates
1010	N/A - line canceled	The system does not update the order since it has been canceled.
1012	2	The system: - decreases the Open Qty for PO# 100 in the PO Layering table to 0 and updates its status to C (Closed). - assigns an expected date of January 1 to the order line.
1015	1	The system: - decreases the Open Qty for PO# 115 in the PO Layering table to 49. - assigns an expected date of February 1 to the order line.

Update on-order quantity? The [UPDATE_ON_ORDER_FROM_PO_LAYERING](#) property controls whether the PO layering process updates the on-order quantity for the warehouse:

- You should set this property to TRUE if you upgrade to 19.0 or higher from a release prior to 18.0, in order to have PO layering update the on-order quantity consistently with prior functionality.
- You should leave this property set to FALSE if you use the [Enterprise Order Integration \(Future Receipts and Active PO/Pre-Order Processing\)](#), since the OCDSFA periodic function also updates the warehouse on-order quantity.

If this property is set to TRUE and you run the OCDSFA periodic function as well as the PO layering process, whichever process ran most recently updates the on-order quantity for the warehouse.

Creating and Updating Ship-to Customers (WCST)

Purpose: Ship to customers can be stored in the system as temporary or permanent records.

You can create a temporary ship to record through Order Entry when you select *Order Ship To*. You might create a temporary ship to record for a gift order. The system stores the temporary ship to record in the Order Ship To table.

The system stores permanent ship to records in the Customer table. Permanent ship to customers are those to whom a sold to customer regularly directs merchandise. You can create permanent ship to customers directly through Customer Maintenance. You can also create permanent ship to records through Order Entry by selecting *Ship To's*.

The system retains mail, item, and order history for permanent ship to customers, and captures information on address changes.

In this topic:

- [Work with Customer Ship Tos Screen](#)
- [Create Ship-to Customer Screen](#)
- [Work with Ship To Phone Numbers Screen](#)
- [Create Ship To Phone Number Screen](#)
- [Work with Ticklers Screen \(ship-to customer view\)](#)

Work with Customer Ship Tos Screen

Purpose: Use this screen to create a permanent ship-to customer, or to change, delete, or display customer ship-to information.

How to display this screen:

- select *Ship To's* for a customer at a Work with Customer scan screen (see [Selecting Customers](#))
- select *Ship To's* at a Create, Change, or Display Customer screen in Work with Customers (see [Creating and Updating Sold-to Customers \(WCST\)](#)) or standard Order Inquiry (see [Using the Order Inquiry Scan Screens \(OIOM\)](#))

Field	Description
Last name	The customer's last name. Enter a full or partial last name to list customers who match your entry alphanumerically. Alphanumeric, 25 positions; optional.
First name	The customer's first name. Enter a full or partial last name to list customers whose names follow your entry alphanumerically. Enter a full or partial last name and first name to list customers with last names and first names that follow your entry alphanumerically. Alphanumeric, 15 positions; optional.
St (State)	The state or province where the customer lives, or receives mail or shipments. See Setting Up the Country Table (WCTY) for more information on state codes. Alphanumeric, 2 positions; optional.
Zip	The postal or zip code for this customer. Alphanumeric, 10 positions; optional.
Ship To #	A unique number assigned to the customer for identification purposes. Numeric, 9 digits; display-only.
Company	The name of the company placing the order. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create a permanent ship-to customer	Select <i>Create</i> to advance to the Create Ship-to Customer Screen .

Screen Option	Procedure
Change ship-to customer information	Select <i>Change</i> for a customer to advance to the Change Ship To Customer screen. You can change any information on this screen except the: - Sold-to customer number and name - Ship-to record number - Match code <i>Customer Workflow Management window:</i> You automatically advance to the Customer Workflow Management Window when you select <i>Change</i> for a ship-to customer if open or in use ticklers exist for the ship-to customer. Select <i>Ticklers</i> at this window to advance to the Work with Ticklers Screen (ship-to customer view) where you can review and work with ticklers associated with the sold to customer and the specific ship to customer.
Delete a permanent ship-to customer	Select <i>Delete</i> for the customer to delete it. If there is an unpurged order on the system for this ship-to customer, the system does not allow you to delete the record. Instead, a message displays: Record not deleted. Ship To 438-1 used on Order # 2664-1.
Display a ship-to customer	Select <i>Display</i> for a customer to advance to the Display Ship To screen. See Create Ship-to Customer Screen for field descriptions. You cannot change any information on this screen.
Work with ship-to phone numbers	Select <i>Phone numbers</i> for a customer to advance to the Work with Ship To Phone Numbers Screen.
Review ship-to customer mail history	Select <i>Mail History</i> for a customer to advance to the Display Ship To Mail History screen. See Display Customer Mail History Screen for field descriptions.
Review ship-to customer item history	Select <i>Item History</i> for a customer to advance to the Display Ship To Item History Screen. (Note: You can review ship-to item history only if the field for the sold-to customer is set to 3.
Review ship-to order history	Select <i>Order History</i> for a customer to advance to the Display Ship To Order History Screen.
Review address changes	Select <i>Previous Addr</i> for a customer to advance to the Display Address Changes Screen.
Work with ticklers associated with the ship-to customer	Select <i>Ticklers</i> for a customer to advance to the Work with Ticklers Screen (ship-to customer view).
Review email correspondence history	Select <i>Email history</i> for a customer to advance to the Work with Email by Customer Ship To Number Screen.
Send customer letters	This option is not currently supported.

Create Ship-to Customer Screen

Create a ship-to customer: At the [Work with Customer Ship Tos Screen](#), select *Create* to add a permanent ship-to customer.

Field	Description
Customer	A number to identify the sold-to customer. Numeric, 9 positions; display-only, assigned by the system.
Name	The following 5 fields are available for you to enter the customer's full name: Prefix A title that belongs before the customer's name (such as "Mrs." or "Dr."). The prefix value will print on labels, reports, etc. Alphanumeric, 3 positions; optional. First Name The customer's first name. Alphanumeric, 15 positions; optional. Initial The customer's middle initial. Alphanumeric, 1 position; optional. Last Name The customer's last name. Alphanumeric, 25 positions; required if Company name is blank. Suffix An addition to the customer's full name, such as ("M.D.", "Fr.", or "III"). Alphanumeric, 3 positions, optional.
Company	The name of the company placing the order. Alphanumeric, 30 positions; required if you do not enter a last name.

Field	Description
Street	The customer's street address. This is the primary delivery address. The United States Postal Service requires a street address for delivery. Shipping to a Post Office Box To ship to a Post Office Box, enter <code>POST OFFICE BOX</code>, <code>POST BOX</code>, or any variation of <code>PO BOX</code> (with or without spaces or non-alphabet characters, such as <code>P.O. BOX</code>), and the box number in the customer's street address. During order processing, the system validates that the carrier can ship to a post office box (as defined in the Ship Via table). <i>Example:</i> Enter <code>P.O. BOX 9999</code> in the Street field to indicate delivery to a post office box instead of a home or company address. Note: If you type <code>POST OFFICE BOX</code>, <code>POST BOX</code>, or any variation of <code>PO BOX</code> in the customer's street address during order entry or through the Order API, the system automatically selects the PO box field for the customer. However, if you remove this text from the customer's street address, the system does not automatically deselect the PO box flag. Note: When you create a customer outside of order processing, you need to select the PO box field manually. Selecting the PO box field manually only applies in Work with Customers (WCST).
Apt./suite	Alphanumeric, 32 positions; required. The apartment number or suite number of the delivery address. To enter an apartment or suite address: Enter <code>APT</code> to indicate an apartment or <code>STE</code> to indicate a suite. Insert a space and type the number of the apartment or suite, for example: <code>APT 4</code> or <code>STE 116</code>. Field contents must conform to United States Parcel Service (USPS) address formatting standards. Always precede the apartment or suite number with the applicable abbreviation (e.g., <code>APT</code> or <code>STE</code>), to meet USPS regulations and correctly identify this information on labels or reports.
Address	Alphanumeric, 10 positions; optional. Three additional lines for the customer's delivery address. Field contents must conform to United States Postal Service (USPS) formatting standards. If the address represents a post office box, you must type <code>P.O. Box</code> on this line to meet USPS regulations and correctly identify this information on labels or reports. Alphanumeric, three 32-position fields; optional.

Field	Description
Postal code	The postal or zip code for this customer. This code represents a delivery area. Required only if the Require postal code? flag is selected for the country; see Setting Up the Country Table (WCTY). If a postal code is required, it is validated against the Zip/City/State (Postal Code) table; see Setting Up the Zip/City/State (Postal Code) Table (WZIP).  Note: The system fills in the City and State fields appropriately if you set up the Postal Code/City/State table and you enter a valid postal code.
City	Alphanumeric, 10 positions; required or optional based on country. The city where the customer lives, or receives mail or shipments. The system completes this field for you when you enter a valid zip code.
St (State)	Alphanumeric, 25 positions; required. The state or province where the customer lives or receives mail or shipments. State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Required only if the Require state? flag is selected for the country. The system validates that the state you enter is assigned to the SCF for the postal code.
Country	Alphanumeric, 2 positions; required or optional based on country. The code for the customer's country. The system defines and validates this code against the Country table. Defaults from the Default Country for Customer Address (B17) system control value.
Delivery code	Alphanumeric, 3 positions; required. Identifies a business (commercial) or residential address. The value is a shipping rate indicator that applies when you ship an order by a carrier that uses or consumer rate tables (such as United Parcel Service). This code defaults from the Default Delivery Code for New Order Entry Customers (D13) system control value, but you can override it. Valid values: • <i>Business</i> = Business rate table determines shipping charges. • <i>Residential</i> = Residential rate table determines shipping charges. • <i>No Distinction</i> = No distinction between residential and business address. (This is not a valid delivery code for a U.P.S. shipper, as defined in the Ship Via table. See Working with SCF/Ship Via Values (WSHV).) Required.

Field	Description
PO box	A flag that identifies the customer's address as a post office box. Whenever an address represents a post office box, orders must ship by Parcel Post. Commercial carriers cannot deliver to Post Office boxes. Valid values are: • <i>Selected</i> = The address is a post office box. • <i>Unselected</i> = The address is not a post office box. Shipping to a Post Office Box To ship to a Post Office Box, enter <code>POST OFFICE BOX</code>, <code>POST BOX</code>, or any variation of <code>PO BOX</code> (with or without spaces or non-alphabet characters, such as <code>P.O. BOX</code>), and the box number in the customer's street address. During order processing, the system validates that the carrier can ship to a post office box (as defined in the Ship Via table). <i>Example:</i> Enter <code>P.O. Box 9999</code> in the Street field to indicate delivery to a post office box instead of a home or company address.  Note: If you type <code>POST OFFICE BOX</code>, <code>POST BOX</code>, or any variation of <code>PO BOX</code> in the customer's street address during order entry or through the Order API, the system automatically selects the PO box field for the customer. However, if you remove this text from the customer's street address, the system does not automatically deselect the PO box flag.  Note: When you create a customer outside of order processing, you need to select the PO box field manually. Selecting the PO box field manually only applies in Work with Customers (WCST).
Rent	This flag identifies whether to include the customer's name on a mailing list that you rent. Valid values are: 1. <i>Selected</i> = Rent the customer's name. 2. <i>Unselected</i> = Do not rent the customer's name. Defaults from the Default Rent Name (D11) system control value.

Field	Description
Mail code	Defines when, and under what circumstances, you will send mail to the customer. Mail codes are defined in and validated against the Mail/Call Code table; see Working with Mail/Call Codes (WMCC). Not to be confused with the Mail flag. Defaults from the Mail code specified for the sold-to customer. If mail flag of customer is Y, then mail code default is Y. If mail flag of customer is N, then mail code is N. Alphanumeric, 3 positions; optional.
Call code	Defines when, and under what circumstances, you will call the customer. Call codes are defined in and validated against the Mail/Call Code table; see Working with Mail/Call Codes (WMCC). Alphanumeric, 3 positions; optional.
Language code	This field is not currently implemented. Alphanumeric, 3 positions; optional.
Email address	The customer's email address. See Email Address Validation for information on how the system verifies that your entry is formatted correctly. Fraud checking: An order goes on <i>ES</i> hold if this email address matches an email address in the Miscellaneous Fraud table; see Working with Miscellaneous Frauds (WMFF). Alphanumeric, 50 positions; optional.
Reserve Warehouse	The warehouse code to default to the Order Header for new orders created for this customer. In this situation, the system reserves inventory for the order from this warehouse only. The warehouse you specify must be an allocatable warehouse (the Allocatable flag for the warehouse is <i>selected</i>). Warehouse codes are defined in and validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions; optional.
Phone numbers	The customer's day, evening and third (fax or mobile) phone numbers.

**Note:**

The [Third Phone Number Type \(L53\)](#) system control value determines whether the third phone number is labeled the Fax or Mobile number.

You can define a telephone number format to map to the phone numbers operators enter into the system. Telephone number formats are defined by arranging numbers and special characters such as hyphens and parenthesis in the same order and position as the numbers in a phone number would display. When an operator enters a phone number, the system compares the number of numeric characters in the phone number with the telephone number formats you have defined. In order to match a format, the phone number must have the same number of numeric positions as a telephone number format. If the system cannot find a match, the phone number does not map to a telephone number format and displays as it was entered by the operator.

Field	Description
	Telephone Number Format Examples An operator enters a phone number containing 10 numbers: 5085550100 The telephone number format used in the United States to represent an area code, local exchange and local phone number is: (508) 555-0100 When an operator enters a phone number containing 10 numbers (as in the example), the phone number displays so that the first 3 positions are in parenthesis and a hyphen is between the sixth and seventh numbers, regardless of how the operator entered it into the system. If an operator enters a phone number containing 6 numbers, for example 5550100, and no format exists for 6 numbers, the phone number would display as it was entered (5550100). See Work with Telephone Number Format Screen for more information. Alphanumeric, 14 positions (phone number) and 4 positions (phone extension); optional.

Work with Ship To Phone Numbers Screen

Purpose: Use this screen to add, change, delete, or display ship-to customer phone numbers quickly. You can also work with phone numbers through the [Create Ship-to Customer Screen](#) and the Change Ship To Customer screen.

How to display this screen: Select *Phone numbers* for a customer at the [Work with Customer Ship Tos Screen](#).

Field	Description
Type	The type of phone number. You can define only one number of each type. Valid values are: • <i>Day</i> = Day/business • <i>Evening</i> = Evening/home • <i>Fax/Mobile</i> = The ship-to customer's third phone number

Note:

The *Third Phone Number Type (L53)* system control value determines whether the third phone number is labeled the Fax or Mobile number on screens and reports.

Optional.

See [Create Ship-to Customer Screen](#) for descriptions of the remaining fields.

Screen Option	Procedure
Create a new phone number	Select <i>Create</i> to advance to the Create Ship To Phone Number Screen .

Screen Option	Procedure
Change a phone number	Select <i>Change</i> for a phone number to change it. You can change the area code, number, and extension. See Create Ship To Phone Number Screen for field descriptions.
Delete a phone number	Select <i>Delete</i> for a phone number to delete it.

Create Ship To Phone Number Screen

Purpose: Use this screen to create a new day, evening, or fax phone number for a ship-to customer.

See [Create Ship-to Customer Screen](#) for more information on phone number formats and validation.

How to display this screen: Select *Create* at the [Work with Ship To Phone Numbers Screen](#).

About this screen: See [Create Ship-to Customer Screen](#) and [Work with Ship To Phone Numbers Screen](#) for field descriptions.

Work with Ticklers Screen (ship-to customer view)

Purpose: Use this screen to review, work with, and resolve ticklers associated with a ship-to customer.

Secured feature: If you do not have authority to the [Update All Ticklers \(B09\)](#) secured feature, you cannot update a tickler that is not assigned to you or your tickler groups or an error message indicates: `Not authorized to change`.

This secured feature controls updating a tickler by:

- selecting *Change* for a tickler to change it.
- selecting *Delete* for a tickler to delete it.
- selecting *In process* for a tickler to assign the tickler to yourself.
- selecting *Resolve* for a tickler to resolve it.

If you do not have access to this feature, you can update only ticklers assigned to you or your tickler groups. However, you can still release an order associated with the tickler from hold.

See [Workflow Management Overview and Setup](#) for an overview and required setup for workflow management processing.

How to display this screen:

- select *Ticklers* for a ship-to customer at the [Work with Customer Ship Tos Screen](#).
- select *Ticklers* at the [Customer Workflow Management Window](#) (which displays when you advance to the Change Ship To Customer screen.).

Field	Description
Sold to	The number and description of the sold to customer associated with the ship to customer. Sold to number: Numeric, 9 positions; display-only. Sold to description: Alphanumeric, 40 positions; display-only.

Field	Description
Ship to	The number and description of the ship to customer associated with the ticklers on this screen. Ship to number: Numeric, 9 positions; display-only. Ship to description: Alphanumeric, 40 positions; display-only.
S (tickler status)	The status of the tickler. Valid values: <i>Open</i> = Open; the tickler is open and is available to work on in the assigned tickler work queue. <i>In Process</i> = In process; the tickler is currently being worked on by the assigned user. <i>Resolved</i> = Resolved; the tickler has been resolved. Optional.
P (tickler priority)	The priority of the tickler, indicating how important the issue associated with the tickler is to resolve (1 is the lowest priority and 9 is the highest priority). Numeric, 1 position; optional.
Assigned (assign date)	The date the tickler was assigned to the user or tickler user group. Numeric, 7 positions (in user date format); optional.
Ev (tickler event code)	The code for the tickler event that created the tickler. Valid values: <i>BO</i> = Backorders <i>CO</i> = Cancelled orders <i>HO</i> = Held orders <i>MN</i> = Manually created <i>NO</i> = New orders <i>OO</i> = Aged open orders <i>SO</i> = Sold out orders <i>UP</i> = Unconfirmed pick tickets <i>VP</i> = Voided pick tickets <i>WF</i> = Remote workflow See System Delivered Tickler Events . Alphanumeric, 2 positions; optional.
Cat (tickler category)	The tickler category assigned to the tickler. Tickler categories are defined in and validated against the Tickler Category table; see Working with Tickler Category (WTCT) . Alphanumeric, 3 positions; optional.
Tickler#	The tickler number assigned to the tickler, from the Tickler Number number assignment record. Numeric, 9 positions; optional.
User group	The group ID code for the tickler user group assigned to the tickler. Tickler user groups are defined in and validated against the Tickler User Group table; see Working with Tickler User Groups (WTUG) . Tickler group ID: Alphanumeric, 10 positions; display-only.
User	The user ID of the user assigned to the tickler. Users are defined in and validated against the User table; see Working with User Records (WUSR) . User ID: Alphanumeric, 10 positions; display-only.

Field	Description
Sts (order status)	The status of the order associated with the tickler. Valid values: • <i>blank</i> = Open. • <i>A</i> = Archived to optical disk. This option is not currently implemented. • <i>C</i> = Cancelled. • <i>H</i> = Held. Note: The system highlights the held status in a different color (for example fuchsia) if the sold to customer is a new customer, based on purchase history. A new customer has placed an order, but no orders have shipped (# orders LTD is equal to or greater than 1 and # sales LTD is equal to 0 in the Customer Sold To Order History table). • <i>P</i> = Purged. • <i>S</i> = Suspended. • <i>X</i> = Closed. Alphanumeric, 1 position; display-only.
Order #	The order associated with the tickler. Numeric, 9 positions; display-only.
Bill to	The bill to customer associated with the tickler. Numeric, 9 positions; display-only.

Screen Option	Procedure
Change a tickler	Select <i>Change</i> for a tickler to advance to the Change Tickler Screen .
Delete a tickler	Select <i>Delete</i> for a tickler to delete it. You can only delete <i>MN</i> (manually created) ticklers.
Display a tickler	Select <i>Display</i> for a tickler to advance to the Display Tickler Screen. See the Change Tickler Screen for field descriptions.
Release the order associated with the tickler from hold	Select <i>Release</i> for a tickler to advance to the Release Reason Prompt Pop-Up Window (order header hold), Release Recipient Hold Reason Pop-Up Window (recipient hold), and/or Release Order Payment Method Window (paytype hold). If you release an order from hold for an <i>HO</i> (held order) tickler, the system automatically resolves the tickler. Also, the system evaluates any other ticklers associated with the order to determine if they can be resolved.

Screen Option	Procedure
	If you select <i>Release</i> for a tickler not associated with a held order, an error message indicates: <code>Order not on hold</code>. If you select <i>Release</i> for a tickler not associated with an order, an error message indicates: <code>Tickler not eligible for this option</code>.
	 Note: You must have authority to the Release Held Orders menu option to release the order from hold.
Select a tickler to work on	Select <i>In process</i> for a tickler to change the status of the tickler from open to in process. You can only select to work with a tickler that is in an open status; if you select <i>In process</i> for a tickler that is in an in process or resolved status, an error message indicates: <code>Tickler status cannot be changed - resolved or already in process</code>. Selecting this option automatically assigns the tickler to the user and creates a tickler history record.
Enter or review tickler work notes	Select <i>Notes</i> for a tickler to advance to the work notes screen, based on the note type defined for the tickler. Note type <i>A</i> advances you to the Edit Customer Actions Window. Note type <i>B</i> advances you to the Work with Bill To Notes Screen. Note type <i>O</i> advances you to the Work with Order Messages Screen. Note type <i>S</i> advances you to the Edit Customer Notes Screen. Note type <i>T</i> advances you to the Work with Tickler Notes Screen.
Review the tickler source	Select <i>Detail</i> for a tickler to advance to the source screen, based on the tickler event associated with the tickler. <i>BO</i>, <i>CO</i>, <i>HO</i>, <i>NO</i>, <i>OO</i>, <i>SO</i>, <i>UP</i>, <i>VP</i>, and <i>WF</i> ticklers advance you to the Order Inquiry Header Screen. You cannot view the source for <i>MN</i> ticklers: Requested tickler has no source reference.
Review tickler history	Select <i>History</i> for a tickler to advance to the Work with Tickler History Screen.
Resolve a tickler	Select <i>Resolve</i> for a tickler to advance to the Resolve Tickler Window.
Review procedures for a tickler	Select <i>Procedure</i> for a tickler to advance to the Work with Tickler Event Rule Procedure Screen. You cannot add or change tickler procedures when you advance from the Work with Ticklers screen. You cannot review procedures for <i>MN</i> ticklers.

Screen Option	Procedure
Create a tickler for the <i>MN</i> (manually created) tickler event	Select <i>Create</i> to advance to the Create Tickler Screen .
	 Note: To create a <i>MN</i> tickler, you must have authority to the Create Manual Tickler (B13) secured feature.
Review the number of ticklers in the work queue, based on the selection criteria you have defined	Select <i>Count</i> to advance to the Current Tickler Count Window .
Toggle between displaying open and in use ticklers or resolved ticklers	Select <i>Open/Resolved</i> . The system toggles between displaying: • ticklers in an open or in process status. • tickler in a resolved status.

Creating and Updating Sold-to Customers (WCST)

Purpose: The system creates a sold to customer record automatically when you:

- enter an order for a new customer through order entry, or the *Generic Order Interface (Order API)*, or
- enter a quote for a new customer through quote entry, or the order API; see [Entering Pre-Order Quotes](#).
- enter a catalog request for a new customer through the ecommerce catalog request interface, or
- process an Add request through the *Generic Customer API*.
For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1)

Although most customers are added to the system by the means listed above, you can also add new customers to the system through Work with Customers, described here.

Outbound customer API: You can generate a customer download XML message when you create, change, or delete a customer. See the *Generic Customer Download API* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).for more information.

Communication with Oracle Retail Customer Engagement: If you use the Oracle Retail Customer Engagement customer integration, Oracle Retail Customer Engagement is the system of record for customer information, and Order Administration synchronizes customer information between the two systems. When you search for a customer in Order Administration, the Oracle Retail Customer Engagement database is searched first; and when you create or update a customer through customer maintenance, Order Administration sends the new or updated name, address, email, and phone number information to Oracle Retail Customer Engagement. See the [Customer Engagement Customer Integration](#) for more information.

In this topic:

- [First Create Sold To Customer Screen](#)

- [Second Create Customer Sold To Screen](#)
- [Changing Sold To Customers](#)
- [Display/Update Bill to Screen](#)
- [More Customer Sold To Options Screen](#)
- [Work with Ticklers Screen \(sold to customer view\)](#)
- [Display Customer Promotions Screen](#)
- [Display Customer Price Group Promotions Screen](#)
- [Display One Time Use Promotions Screen](#)

First Create Sold To Customer Screen

Purpose: You use two Create Customer Sold-to screens to create new customers.

How to display this screen: Select *Create* at the [Select Customer Sold To Screen](#).

Field	Description
Customer (Customer number)	A unique number to identify a customer. The system assigns a customer number automatically when you create a new Sold To Customer record. The system assigns the customer number whether or not you complete the customer record. Numeric, 9 positions; display-only, assigned by the system.
Match code	A code assigned by the system to identify duplicate customers and detect fraudulent addresses. When you create a new customer, the system creates the standard match code automatically, based on selected elements of the customer's name and address. The match code is compared against match codes in the Fraud tables; if there is a match, the order is placed on hold. Also, the system updates the match code automatically when you change any of the related elements. The system uses the match code when determining whether to use an existing customer or create a new customer on orders you receive through the order API; see Remote Order Values (F70). Alphanumeric, 15 positions; display-only.
Entered	The date you create the customer record. The system uses the job date for this value, and assigns this date as soon as you select <i>Create</i>. Numeric, 6 positions (in user date format), display-only, assigned by the system.
Name	The following 5 fields are available for you to enter the customer's full name: Prefix A title (such as "Mrs." or "Dr.") that precedes the customer's name. The prefix prints on labels and forms. Alphanumeric, 3 positions; optional. First Name The Sold-to customer's first name. Alphanumeric, 15 positions; optional. Initial The initial of the customer's middle name. Alphanumeric, 1 position; optional.

Field	Description
	Last Name The customer's last name. Alphanumeric, 25 positions; required if company name is not present.
	Suffix An addition to the customer's full name (such as "M.D.," "Fr.," or "III"). The suffix prints on labels and forms, but is not accessible to scans. Alphanumeric, 3 positions, optional.
Company	The name of the company associated with the customer placing the order. Alphanumeric, 30 positions; required if last name is not present.
Street	The customer's street address. This is the primary delivery address. Shipping to a Post Office Box To ship to a Post Office Box, enter POST OFFICE BOX, POST BOX, or any variation of PO BOX (with or without spaces or non-alphabet characters, such as P.O. BOX), and the box number in the customer's street address. During order processing, the system validates that the carrier can ship to a post office box (as defined in the Ship Via table). <i>Example:</i> Enter P.O. Box 9999 in the Street field to indicate delivery to a post office box instead of a home or company address.

**Note:**

If you type POST OFFICE BOX, POST BOX, or any variation of PO BOX in the customer's street address during order entry or through the Order API, the system automatically selects the PO box field for the customer. However, if you remove this text from the customer's street address, the system does not automatically deselect the PO box flag.

**Note:**

When you create a customer outside of order processing, you need to select the PO box field manually. Selecting the PO box field manually only applies in Work with Customers (WCST).

Alphanumeric, 32 positions; required.

Field	Description
Apt/suite (Apartment/suite)	The apartment number or suite number associated with the customer's delivery address. Follow these steps to enter an apartment or suite address: - Type <i>APT</i> to indicate an apartment or <i>STE</i> to indicate a suite. - Insert a space and type the number of the apartment or suite, for example: <i>APT 4</i> or <i>STE 116</i>. Addresses must conform to United States Parcel Service (USPS) address formatting field description standards. For example, always precede the apartment or suite number with the appropriate abbreviation (for example, APT or STE). Alphanumeric, 10 positions; optional.
Address	Three additional lines of the customer's delivery address. If the address represents a post office box, you must type <i>P.O. Box</i> on the first line to meet USPS delivery regulations. Alphanumeric, three 32-position lines; optional.
Postal code	The postal or zip code for this customer. This code represents a delivery area. If a postal code is required for the country, it is validated against the Zip/City/State (Postal Code) table; see Setting Up the Zip/City/State (Postal Code) Table (WZIP).
 Note: The system fills in the City and State fields appropriately if you set up the Postal Code/City/State table and you enter a valid postal code.	
City	Alphanumeric, 10 positions; required or optional based on country. The city where the customer lives or receives mail or shipments. Alphanumeric, 25 positions; required.
St (State)	The state or province where the customer lives or receives mail or shipments. State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Required only if the Require state? flag is selected for the country. The system validates that the state you enter is assigned to the SCF for the postal code. Alphanumeric, 2 positions; required or optional based on country.
Country	The code for the customer's country. Country codes are defined in and validated against the Country table. The Default Country for Customer Address (B17), if any, from the System Control table defaults here when you create a new customer; however, you can override the default. Alphanumeric, 3 positions; required.

Field	Description
Delivery code	Identifies a business (commercial) or residential address. Used to calculate shipping charges for shippers that use rate tables (such as U.P.S.). The Default Delivery Code for New Order Entry Customers (D13) system control value defaults here; however, you can override this default. If this system control value is blank, a setting of Business defaults. Valid values: • <i>Business</i> = Business rate table determines shipping charges. • <i>Residential</i> = Residential rate table determines shipping charges. • <i>No distinction</i> = No distinction between business and residence.

**Note:**

Only *Business* and *Residential* are valid values for U.P.S. The system defines the shipper on an order as U.P.S. if the Type field in the Ship Via table = *U*; see [Working with Ship Via Codes \(WVIA\)](#).

Required.

Field	Description
PO box	A flag that identifies the customer's delivery address as a Post Office box. Whenever you identify an address as a PO box, orders must ship by Parcel Post. Valid values are: • <i>selected</i> = The address is a Post Office box. • <i>unselected</i> (default) = The address is not a Post Office box. Shipping to a Post Office Box To ship to a Post Office Box, enter POST OFFICE BOX, POST BOX, or any variation of PO BOX (with or without spaces or non-alphabet characters, such as P.O. BOX), and the box number in the customer's street address. During order processing, the system validates that the carrier can ship to a post office box (as defined in the Ship Via table). <i>Example:</i> Enter P.O. Box 9999 in the Street field to indicate delivery to a post office box instead of a home or company address.

 Note:

If you type POST OFFICE BOX, POST BOX, or any variation of PO BOX in the customer's street address during order entry or through the Order API, the system automatically selects the PO box field for the customer. However, if you remove this text from the customer's street address, the system does not automatically deselect the PO box flag.

 Note:

When you create a customer outside of order processing, you need to select the PO box field manually. Selecting the PO box field manually only applies in Work with Customers (WCST).

Class

A code that categorizes customers at a high level for reporting purposes. You can use customer class codes to:

- send offers to a limited group of customers
- restrict item sales to a group of customers
- bypass normal item reservation (If the customer is assigned to a class flagged to bypass reservation, then the bypass setting applies even if the *Bypass res (Bypass reservation)* setting for the customer is *unselected*)
- determine whether to prompt for user-defined fields in order entry

You can define a *Default Customer Class in Order Entry (D63)* to assign to all customers you create through order entry.

Field	Description
	<i>Required?</i> The Require Customer Class (H85) system control value defines whether this field is required. <i>Secured?</i> The Maintenance of Customer Class Field (B07) secured feature defines whether you can enter or maintain the customer class field at this screen.
	 Note: If the Require Customer Class (H85) is <i>selected</i> and the customer does not have a customer class code assigned, a user who does not have authority based on the Maintenance of Customer Class Field (B07) secured feature cannot update a customer.
	See Setting Up the Customer Class Table (WCCL) on working with customer classes.
Type	Alphanumeric, 2 positions; optional. A user-defined code to identify a group of customers further for reporting purposes. Alphanumeric, 3 positions; optional.
Salesrep # (Sales representative number)	A number that identifies a sales representative who takes an order. You can use Salesrep information for tracking and reporting sales activity and commissions. This number appears during order entry when you enter a new order for this customer. Salesrep numbers are defined in and validated against the Salesrep table. See Working with Sales Representatives (WSLS). If you prompt on this field, the system displays the Select Salesrep window where you can review and select a valid salesrep. The window indicates whether the salesrep is active and if a home store has been assigned to the salesrep. Numeric, 7 positions; optional.

Field	Description
Suppress Sales Rep Email	Defines whether the <i>Outbound Email XML Message (CWEmailOut)</i> sent to this sold to customer is also sent to the email address of the salesrep assigned to the customer. • <i>Selected</i> = Do not send Outbound Email (CWEmailOut) messages sent to the sold to customer to the email address of the salesrep assigned to the customer. The system sets the <i>sold_to_suppress_sales_rep_email</i> attribute in the CWEmailOut message to Y, indicating a copy of the message was not sent to the salesrep. • <i>Unselected</i> = Send Outbound Email (CWEmailOut) messages sent to the sold to customer to the email address of the salesrep assigned to the customer. The system sets the <i>sold_to_suppress_sales_rep_email</i> attribute in the CWEmailOut message to N, indicating a copy of the message was sent to the salesrep. The system sends a CWEmailOut message to the email address of the salesrep assigned to the customer for the following <i>notification_types</i>: • <i>order confirmations</i> (notification_type OC). • <i>shipment and return confirmations</i> (notification_type SC and RC). • <i>backorder notices</i> (notification_type B1, B2, B3). • <i>soldout notifications</i> (notification_type S1). For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) This setting does not apply to emails generated through the Narvar Integration.
Changed	The date of the most recent update to the customer's record. The system uses the starting date of the ORDR_ASYNC job that was running at the time of the update.

**Note:**

This field is on the Change and Display screens only.

Numeric, 6 positions (in user date format); display-only.

Field	Description
Opt in/Opt out	Indicates the preferred method of correspondence for the primary email address. Valid values are: • <i>O1</i> (Email) = Email is the preferred method of correspondence. • <i>O2</i> (Order-only email) = Use email for order-related correspondence only; generate a document for other correspondence. • <i>O3</i> (No email) = Do not use email for any correspondence; generate a document instead. • <i>O4</i> (Do not ask the customer) = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified. For a new customer, this value defaults from the Default Opt In/Opt Out Flag (G97) system control value, but you can override the default.  Note: The above values use the letter O, not the number 0 (zero).
	Email notifications: See When Does the System Generate an Email Notification? for an overview. Outbound email API: The opt in/opt out settings controls the generation of the <i>Outbound Email XML Message (CWEmailOut)</i> using the same logic as the generation of outbound emails. See <i>Outbound Email API</i> for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) Updating from an external system: See Receiving Customer Email Status Updates From an External System for an overview and the required setup. Alphanumeric, 2 positions; required.
Language	Informational. Language codes are defined in and validated against the Language table; see Working with Language Codes (WLAN) for more information. Alphanumeric, 3 positions; optional.
Mail code	This code specifies how often, and under what conditions, you send mail to the customer. You can use this code to indicate the customer's mail preferences with more precision than the Mail flag, discussed below, permits. Mail codes are defined in and validated against the Mail/Call Code table. See Working with Mail/Call Codes (WMCC). After you create a sold-to customer at this screen, the value in the Mail flag defaults into the mail code field if you have not entered a mail code. You must define this value (either Y or N) in the Mail/Call Code table or the screen displays an error message. Alphanumeric, 3 positions; optional.

Field	Description
Call code	This code specifies how often, and under what conditions, you call the customer. Call codes are defined in and validated against the Mail/Call Code table. See Working with Mail/Call Codes (WMCC). Alphanumeric, 3 positions; optional.
Currency	This field is not currently implemented. Alphanumeric, 3 positions; optional.
Mail	Controls whether the customer receives future catalogs. Not to be confused with the three-position, alphanumeric Mail code field described above. This field is <i>selected</i> or <i>N</i> for new customers (added through order entry or a catalog request), depending on the value in the Default Mail Name (D10) system control value. Also defaults into the mail code on the first Create Customer Sold To screen, although you can override it. Valid values are: • <i>selected</i> = Mail catalogs to the customer • <i>unselected</i> = Do not mail catalogs to the customer
Rent	Controls whether to include the customer's name in lists you sell to other companies for their own catalog mailings. This field is <i>selected</i> or <i>N</i> for new customers (added through order entry or a catalog request), depending on the value in the Default Rent Name (D11) system control value. Valid values are: • <i>selected</i> = You can sell the customer's name to another company • <i>unselected</i> = Do not sell the customer's name to another company
Do not fax	Informational only. This field displays only if the Third Phone Number Type (L53) system control value is set to FAX. • <i>selected</i> = Do not fax the customer. • <i>unselected</i> = Authorized to fax the customer.
Inactive	Identifies the customer's status. You can still place orders for inactive customers. This information is useful for exception reporting you might conduct on your house list. Valid values are: • <i>selected</i> = Customer is inactive. • <i>unselected</i> (default) = Customer is active.
Commercial	Identifies whether the customer is commercial for reporting purposes. Valid values are: • <i>selected</i> = This is a commercial customer. • <i>unselected</i> (default) = This is a non-commercial customer.

Field	Description
Hold/bypass/fraud	Controls how credit checking is performed for the customer during order entry. Valid values are: • <i>Hold</i> = The system places the customer's orders on hold automatically so you can review, then manually release each order. • <i>Bypass</i> = Orders for the customer are not included in the credit check function in order entry; however, the customer is still subject to other fraud-checking, as described in for the Fraud Checking (A68) system control value. • <i>Fraud</i> = The system places the customer's orders on "fraud" hold automatically so you can review each order and release it as needed. Entering the customer's name in the Fraud table does not by itself set this field to <i>Fraud</i>, although the system still holds all of the customer's orders for fraud. The system generates a report that identifies all held orders and their reason codes. You can review this information through Order Inquiry. See Releasing Held Orders for more information about held orders and reason codes. The Maintenance of Hold/Fraud/Bypass Flag (A57) secured feature controls access to this field. If you attempt to change this field and you do not have proper authority, an error message indicates: Not authorized to maintain. Alphanumeric, 1 position; optional.

Field	Description
Bypass res (Bypass reservation)	Controls when to reserve items for the customer. This feature lets you reserve inventory selectively for direct and wholesale customers and manage distribution of large quantities of merchandise. It is useful to assign a consistent customer class to customers flagged to bypass reservation, so that you can easily scan for these customers in Working with Interactive Reservation (MIRV). Valid values are: <i>selected</i> = The customer bypasses reservation; you need to use Working with Interactive Reservation (MIRV) to reserve items for the customer. <i>Important:</i> Use this flag only if the Use OROB for Fulfillment Assignment (M31) system control value is unselected; if this system control value is selected, the system uses the Bypass reservation flag to send items to Order Orchestration for fulfillment assignment; see Brokered Backorders. <i>unselected</i> (default) = The system reserves inventory in the normal way for all orders for this customer (either through regular order entry or batch reservation, depending on the setting of the Immediate Reservation (A64) system control value) unless the customer is assigned to a customer class flagged to bypass reservation. Determining whether to bypass reservation based on customer-level setting or customer class setting: - If the Bypass res flag for the customer is <i>selected</i>, the customer always bypasses reservation regardless of whether there is a Class specified for the customer, or the class's Bypass reservation setting - If the Bypass res flag for the customer is <i>unselected</i>, the customer still bypasses reservation if there is a Class specified for the customer and the class is flagged to Bypass reservation. See Setting Up the Customer Class Table (WCCL) for more information on customer class.
Auto cancel B/O (Automatic cancel backorder)	Controls whether the system cancels items that are not in stock (backordered items) automatically with the first shipment on the order. Select this field for customers who want only one shipment on an order. The setting appears in the Auto can B/O field during order entry. Valid values are: <i>selected</i> = Cancel backordered items automatically with the first shipment on the order. <i>unselected</i> (default) = Do not cancel backordered items.

Field	Description
Track item history	Controls the level of sales history to capture for each customer. Valid values are: • <i>No Item Tracking</i> = Do not track the sale of items for the customer. • <i>Sold To Tracking Only</i> = Track item history for the customer placing the order (Sold To customer) only. • <i>Sold To + Ship To Tracking</i> = Track item history for the customer placing the order (Sold To customer) and the customer receiving the order (Ship To customer). The Default Item History Tracking (B18) system control value controls how this field defaults when you create a new customer. You can change this value at any time through Work with Customers, even after entering orders, to gain visibility to the ship-to customers' item history. Optional.

Duplicate customer: A pop-up window appears if the system identifies the new customer as a “duplicate.” Here, you can select an existing customer record or select *Accept* to create a new customer record from the name and address information you entered.

Second screen: Select *OK* to advance to the [Second Create Customer Sold To Screen](#).

Second Create Customer Sold To Screen

How to display this screen: Select *OK* at the [First Create Sold To Customer Screen](#).

Continue entering information on this screen to complete creation of a new customer.

Field	Description
Customer	A unique number to identify the customer. Numeric, 9 positions; display-only.
Bill to	The bill-to account assigned this customer. You can assign only one bill-to record to a sold-to customer; however, multiple sold-to customer records can use the same bill-to customer record. See Creating and Updating Bill-to Customers (WCBT). If a sold-to customer is assigned a bill-to customer in this field, that bill-to customer is added to each new order for the customer. Numeric, 7 positions; optional.
Alternate customer number	An additional way to identify a customer, such as a customer or membership number in another system. Alternate Customer Number Label Description The field label on this screen is based on the name you enter in the Alternate Customer Number Label Description (H95) system control value; if you do not enter a name in this system control value, the field label is Alt cust. <i>Example:</i> If you enter the field label name <i>MEMBER#</i> in the system control value, the field label on this screen is <i>MEMBER#</i>. Secured Feature The Change Alternate Customer Number (B11) secured feature controls whether you can change this entry; if you prohibit access to this feature, the system displays an error message if you try to change the value: Not authorized to add/change Alt Customer #.

Field	Description
	Alternate Customer Number Cross Reference The alternate customer number at this screen is normally duplicated in the Alternate Customer # Cross Reference table. The system uses this table as a means to track each alternate customer number that has ever been assigned to the customer. Whenever you enter a value in the Alt cust field, the system creates a matching record in the Alternate Customer # Cross Reference table. See Working with Alternate Customer Number Cross-References for more information. Automatic Alternate Customer Number Assignment The Assign Alternate Customer # (I88) system control value controls whether the system automatically assigns an alternate customer number each time a customer is created by any means. See that system control value for more information. • If the Display Alternate Customer Cross Reference Window (I84) system control value is <i>selected</i>, you cannot delete an existing alternate customer number; however, you can replace the alternate customer number. You can also delete alternate customer number cross-references through the Working with Alternate Customer Number Cross-References option. • If the Display Alternate Customer Cross Reference Window (I84) system control value is <i>unselected</i>, you can delete an existing alternate customer number only if there are no additional cross references stored in the Alternate Customer # Cross Reference table besides the one that matches the Alt cust itself. In this situation, when you delete the Alt cust, the system also deletes the matching Alternate Customer # Cross Reference record. Numeric, 7 positions; optional or display-only, as described above. Phone # (Day, Eve, Fax or Mbl) The customer's day, evening and third (fax or mobile) phone numbers.

**Note:**

The [Third Phone Number Type \(L53\)](#) system control value determines whether the third phone number is labeled the Fax or Mbl (mobile) number.

You can define a telephone number format to map to the phone numbers operators enter into the system. Telephone number formats are defined by arranging numbers and special characters such as hyphens and parenthesis in the same order and position as the numbers in a phone number would display. When an operator enters a phone number, the system compares the number of numeric characters in the phone number with the telephone number formats you have defined. In order to match a format, the phone number must have the same number of numeric positions as a telephone number format. If the system cannot find a match, the phone number does not map to a telephone number format and is displayed as it was entered by the operator.

Field	Description
	Telephone Number Format Example An operator enters a phone number containing 10 numbers: 5085550100 The telephone number format used in the United States to represent an area code, local exchange and local phone number is: (508) 555-0100 When an operator enters a phone number containing 10 numbers (as in the example), the phone number displays so that the first 3 numbers are in parenthesis and a hyphen is between the sixth and seventh numbers, regardless of how the operator entered it into the system. If an operator enters a phone number containing 6 numbers, for example 5550100 and no format exists for 6 numbers, the phone number would display as it was entered (5550100). See Work with Telephone Number Format Screen. Alphanumeric, 14 positions; optional.
Ext (Extension)	The extension of the customer's phone or fax number. Numeric, 4 positions; optional.
Reserve Warehouse	The warehouse code to default to the Order Header for new orders created for this sold-to customer. In this situation, the system reserves inventory for the order from this warehouse only. The warehouse must be an allocatable warehouse (the Allocatable flag for the warehouse is <i>selected</i>). Warehouse codes are defined in and validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions; optional.
Source (Current, Original)	A unique code to identify a segment of your customer base (list of customers) targeted for an offer (catalog, newspaper or television advertisement). Source codes can be used to analyze sales and determine the effectiveness of advertising or catalog offerings. You may set up special prices or discounts for a source code. See Working with Source Codes (WSRC). The following two fields are available for source codes: Current source code The source code used by the customer on the most recent order. You can change this value. Alphanumeric, 9 positions; optional. Original source code A code that identifies how you first acquired the customer. The system retains the source code used on a new customer's first order or catalog request, depending on how you first acquired the customer. If the Update Original Source Code for Recipient Customers (F90) system control value is <i>selected</i> and the Original source code field for the customer is blank, the system updates the Original source code field for a recipient customer with the source code defined on the order header for the customer sold to. Alphanumeric, 9 positions; display-only.

Field	Description
Mail type (Current, Original)	This code identifies the source of the customer based on how you and the customer first established contact (Original mail type) and whether the customer then purchased merchandise from you (Current mail type). Valid values are: • <i>Buyer</i> = a customer who places an order (the “sold-to” customer). A customer is coded as a buyer when this customer places an order, if the order is accepted. Note: • The system does not update a customer’s mail type to <i>Buyer</i> when you accept a quote for the customer; see Entering Pre-Order Quotes. • The mail type is not set to Buyer until the order async processing takes place; until that time, the mail type is <i>Suspect</i>. • <i>Catalog request</i> = a person who requested a catalog. The system assigns this mail type to customers that you add through: • Work with Customers; or • a catalog request order type, if the order is accepted. The system compares the order type with the Order Type to Process as Catalog Request/Item Samples (E08) system control value to determine if an order is a catalog request. • <i>Recipient</i> = the customer who receives the order (also known as the Ship To customer). The system tracks the mail type only for ship to customers that you add to an order by selecting <i>Accept/Add Recip</i> or <i>Sold To/Recip</i>. Note: The system does not update a customer’s mail type to Recipient when you accept a quote that contains the customer as a ship to customer; see Entering Pre-Order Quotes. • <i>Suspect</i> = a customer whose name you acquired through a telemarketing effort or a public or industry listing, or a customer who places an order that is then rejected. Also, when you create a new customer through order entry or the order API, the customer’s mail type is initially set to <i>Suspect</i> until the order async process completes its updates; at that time, the mail type is set to <i>Buyer</i>. Entity: If the Track Customer History at Entity Level (F89) system control value is <i>selected</i>, the system also tracks the mail type separately for each entity based on the first activity for the customer within the entity. For example, if the first activity for a customer within entity 100 is to place and accept an order, the mail types for this customer/entity are set to <i>Buyer</i>, even though the customer-level current and original may be set differently.

Field	Description
	There are two categories of mail type, as follows: Current mail type The customer's current status.  Note: The only time that the system updates the current mail type at either the customer or entity level is to change the code to a <i>Buyer</i> if an existing customer places and accepts an order. Alphanumeric, 1 position; display-only, updated by the system. Original mail type The original status of the customer.  Note: You cannot change the original mail type, and the system never updates it automatically after initial creation and any related async processing (that is, to change the mail type from <i>Suspect</i> to <i>Buyer</i> for a new customer created through order entry or the order API). The only exception to the above rule is if you happen to enter an order for a customer and reject it (producing an original mail type of <i>Suspect</i>), and then enter an order and accept it <i>on the same day</i>; in this case only, the original mail type changes to <i>Buyer</i>. Display-only, updated by the system. Seed Identifies a customer name that you “plant” in a list to ensure that the company buying the list pays you for each use. Valid values are: • <i>selected</i> = This customer is a seed. • <i>unselected</i> = This customer is not a seed.  Note: Flagging a customer as a seed on your house rental list does not prevent you from placing orders for the customer.

Field	Description
Ghost	A customer number that remains in the system after you merge duplicate customer records. Duplicate match codes can result when two customers have similar demographic information. For example, Gerald Smith and Geraldine Smith live at the same address. Duplicates may also occur during order entry when customers use variations of their first names on different orders. For example, John Jones places orders on two occasions, and gives John as his first name on one order, Jack as his first name on another order. When duplicate customers exist in the database, you can run a merge program that combines the duplicate customer information into a single (target) customer record. You can, optionally, retain the source customer as a ghost customer. See Working with Merge/Purge Sold-to Names (MMCS) for more information on the merge/purge function. If you enter a ghost customer number in order entry, a pop-up window warns you that the customer you entered is a ghost customer. If you press <i>Enter</i> to advance to the order header screen, the target customer defaults on the order. For example, if you enter 202, a ghost customer, the Ghost Customer Number Warning Window opens, informing you that customer 202 has been merged into customer 137. When you continue with the order process, customer 137 defaults on the Work with Order screen. Ghost customers do not display on any scan screens in order entry, order maintenance, order inquiry, customer maintenance, working with return authorizations, or working with customer memberships. If you enter a ghost customer number in any maintenance function, the system does not display any history, such as orders, because all history has been merged to the target customer. Valid values are: • <i>selected</i> = This is a ghost record. • <i>unselected</i> = This is not a ghost record.  Note: If this field is <i>selected</i>, you can change it; if you deselect, the system no longer considers the customer a ghost, and no pop-up window opens in order entry when you enter the customer's number. If this field is <i>unselected</i>, you cannot change it; ghost customers can be created only when performing a merge/purge.
Associate	Identifies whether the customer as an associate or member who is eligible to receive special pricing on merchandise. The Default Associate Code (D09) system control value determines the default value of field for new customers. Valid values are: 1. <i>selected</i> = The customer is an associate customer. 2. <i>unselected</i> = The customer is not an associate customer. Secured Feature The Change Associate Customer Flag (B10) secured feature controls whether you can change this entry; if you prohibit access to this feature, an error message indicates if you try to change the value: Not authorized to change Associate Customer.

Field	Description
Birth Month/Day	The sold to customer's birth month and birth day. Valid birth months are: Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec. Valid birth days are 1-31. The system validates the birth day against the selected birth month. The system stores the birth month and day in the Customer Sold To table. The birth year does not display on the screen; however, it defaults to 1900 in the Customer Sold To table unless it has been updated through the Customer Engagement Customer Integration. Birth Month: Numeric, 2 positions (01-12 in table); required if you define a birth day. Birth Day: Numeric, 2 positions; required if you define a birth month. Birth Year (in table only): Numeric, 4 positions; optional.
Price discount %	The discount applied automatically to the regular offer price for items on each order the customer places.

**Note:**

If the customer has a Price discount % and is also flagged as an Associate (see above), then the system applies the Price discount % to the regular offer price, not to the associate price.

	<i>Example:</i> Customer is flagged as an associate and also has a Price discount % of 10%. The regular offer price of an item is \$100.00, and the associate price is \$95.00. The system applies the 10% discount to the regular offer price of \$100.00, resulting in a price to the customer of \$90.00. Numeric, 5 positions with 2 place decimal; optional.
Price column	The customer's pricing column. Items may be set up on the system with special (discounted) prices for different price columns. When the customer orders this item, the customer pays the discounted price automatically if the customer's pricing column and the item's pricing column are the same. Numeric, 2 positions; optional.

Field	Description
Price group	The customer price group to use for quantity price matrix pricing, customer price group pricing, or as a qualifier for a promotion. You can assign the price group through customer maintenance, or by passing the code through the order API or customer API. Customer price groups are defined in and validated against the Customer Price Group table. If you do not assign a customer price group to a customer, the system assigns the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value to the customer. For more information: See: • Working with Customer Price Groups (WCPG) • Working with Quantity Price Matrix (WQPM) • Customer Price Group Pricing • Working with Promotions (WPRO) • Generic Order Interface (Order API) in the Order Administration Web Services Guide • Generic Customer API in the Order Administration Web Services Guide For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) Alphanumeric, 4 positions; optional.
Tax code	The tax status of this customer. Valid values are: • <i>Exempt</i> = The customer is not required to pay tax on purchases. If the order is shipping to a Canadian address, it is exempt from both GST and PST. • <i>GST Only</i> = The customer is a Canadian customer and subject to the Goods and Services Tax on purchases only, not PST. See Working with GST Tax Exemption Status (MGTX) for information on how tax is calculated in this case. • <i>Non Taxable</i> = The system determines the customer's tax status in order entry based on whether you enter a Resale/Exempt # and on the shipping address. • <i>PST Only</i> = The customer is a Canadian customer and subject to the Provincial Services Tax only, not GST. See Working with GST Tax Exemption Status (MGTX) for information on how tax is calculated in this case. • <i>Resale</i> = The customer is a reseller and not subject to tax. If the order is shipping to a Canadian address, it is exempt from both GST and PST. • <i>Standard Tax</i> = The customer is subject to all taxes. Canadian customers are subject to both GST and PST tax. If you select a tax code of <i>Exempt</i> or <i>Resale</i>, an Tax identification is also required. The customer's tax code and tax identification number defaults in order entry. At that time the system validates that the customer's Expiration date (Tax identification expiration date), if one has been entered, has not passed; if so, an error message indicates that you need to change the customer's tax information before proceeding with the order. The tax-related fields on this screen override any information you enter for specific states or provinces. You should enter <i>either</i> customer-level tax information or state/province-level tax information. See Working with Customer Tax Status for a complete description of how customer tax information defaults in order entry. Required if a Tax identification code is entered.

Field	Description
VAT number	The customer's VAT exemption number. The system checks this field only if the Tax Included in Price (E70) system control value is <i>selected</i>; if so, and if the order would normally be subject to VAT, this number provides a VAT exemption for the customer. The VAT number is not subject to the Expiration date and cannot be overridden in order entry. See Working with Customer Tax Status for a complete description of how customer tax information defaults in order entry. Alphanumeric, 20 positions; optional.
Tax identification	The customer's tax identification number, typically the resale or exempt certificate number assigned to a customer who is identified as tax exempt (<i>E</i>) or as a reseller (<i>R</i>); otherwise, the tax identification number does not control taxability. Any combination of letters, numbers, or special characters is accepted. If you enter a tax identification number, the expiration date is also required. Alphanumeric, 30 positions; required if customer is defined as tax exempt or as a reseller.
Expiration date (Tax identification expiration date)	The date the customer's exempt or reseller tax identification expires. In evaluating the customer's tax status, either at the customer level or for a specific state, the system validates that any date entered in this field has not passed, or that this date is blank. See Working with Customer Tax Status for a complete description of how customer tax information defaults in order entry. Numeric, 6 positions (in user date format); required if a Tax identification code is entered.
Pop up window messages 1-4	Four optional message lines. Where do these messages display? These messages display on the: • Customer Selection Screen as one 80-position field. Note: The system does not add or remove any spaces when displaying these messages as one 80-position field; enter the text as you wish it to display. For example: If a word ends at the end of a message, put a space at the beginning of the next message so that the next word is separated from the previous word. If a word splits between the end of one message and the beginning of the next message, do not add a space at the end of the first message or the beginning of the next message. • Display Pop Up Msgs For Window in order entry for this customer unless the customer advanced to the order from the Customer Selection Screen. Secured feature: The Access to Customer Pop-up Messages (A79) secured feature controls whether you can create or change a customer message. If this secured feature is set to <i>*ALLOW</i>, you can create or change a customer message. If this secured feature is set to <i>*EXCLUDE</i>, the message fields are display-only. Alphanumeric, 20 positions each field; optional.

Field	Description
Email address	The customer's primary email address. This address, along with any other email addresses for the customer, is stored in the Customer Sold To Email table. A plus sign (+) indicates that there are additional email addresses on record for the customer. See Email Address Validation for information on how the system verifies that your entry is formatted correctly. Entering a new email address: If you overwrite the existing email address in this field, the system flags your entry as the primary email address for the customer, but retains the previous email address in the Customer Sold To Email table. In order to delete the previous email address from this table, you need to prompt in order to display the Select Customer Email Address Screen and delete the previous email address there. See Working with Customer Email Addresses for an overview. Deleting the email address: Similar to entering a new email address, if you delete the email address at this screen, the system removes the primary email flag for the address but retains the address in the Customer Sold To Email table. Follow the steps described above to delete the email address from this table. Defaulting in order entry: The customer's primary email address defaults in order entry. See Working with an Order-Level Email Address for an overview. Email notifications: See When Does the System Generate an Email Notification? for an overview of how the system determines when to generate an email notification to the customer, and which email address to use. Email format: See Email Address Validation for information on how the system verifies that your entry is formatted correctly. Alphanumeric, 50 positions; optional.
Job title	The customer's job title. This field is not currently implemented. Alphanumeric, 26 positions; optional.
User fields (1-4)	Four additional fields you can use to enter any type of information about the customer. Alphanumeric, 10 positions per field; optional.

Screen Option	Procedure
Work with customer address information	Press <i>Page Up</i> to advance to the First Create Sold To Customer Screen , Change Customer Sold To screen (1 of 2), or the Display Customer Sold To screen (1 of 2), depending on whether you are creating, changing, or displaying a customer.
Work with ship-to customers	Select <i>Ship To's</i> to advance to the Work with Customer Ship Tos Screen .
Work with bill-to customers	Select <i>Bill To</i> . If the customer already has a bill-to customer, you advance to the Work with Bill To Customers Screen . If the customer does not already have a bill-to customer, you advance to the Create Bill-to Customer Screen .
Work with customer subscriptions	Select <i>Subscriptions</i> to advance to the Work with Subscriptions Screen .
Work with more customer sold to options	Select <i>More options</i> to advance to the More Customer Sold To Options Screen .

Screen Option	Procedure
Work with contract pricing	Select <i>Contract Pricing</i> to advance to the Work with Contract Price Screen .
Work with customer tax status in specific states or provinces	Select <i>Customer Tax</i> to advance to the Working with Customer Tax Status . See Working with Customer Tax Status for an overview.
Review mail history	Select <i>Mail History</i> to advance to the Display Customer Mail History Screen . See Reviewing Customer History for an overview of customer history.
Enter and resolve customer actions	Select <i>Customer Actions</i> to advance to the Edit Customer Actions Window .
Work with customer profile	Select <i>Customer Profile</i> to advance to the Work with Customer Profile Screen .
Review item history	Select <i>Item History</i> to advance to the Customer Sold To Item History Screen . See Reviewing Customer History for an overview of customer history.
Review order history	Select <i>Order History</i> to advance to the Display Customer Order History Screen . See Reviewing Customer History for an overview of customer history.
Exclude customers from using certain payment methods	Select <i>Pay Type Excl.</i> to advance to the Exclude Pay Types By Customer Screen .
Work with customer notes	Select <i>Notes</i> to advance to the Edit Customer Notes Screen .

Changing Sold To Customers

To change: Select *Change* for a customer at a scan screen or enter a customer number at the [Select Customer Sold To Screen](#) to change it. You advance to the first Change Customer screen. Select *OK* at the first Change Customer screen to advance to the second Change Customer screen.

See [Selecting Customers](#) for more information.

Customer Workflow Management window: The [Customer Workflow Management Window](#) automatically opens when you select *Change* for a customer if open or in use ticklers exist for the sold to customer. Select *Ticklers* at this window to advance to the [Work with Ticklers Screen \(sold to customer view\)](#) where you can review and work with ticklers associated with the sold to customer.

Field descriptions: See [First Create Sold To Customer Screen](#) and [Second Create Customer Sold To Screen](#) for field descriptions.

Match code update: You can change customer information on either Change Customer screen. If you change any of the information that the system extracts for the match code, the match code is updated also.

Affected functions: Several functions are affected when you change sold to information:

- The system records the change in the Customer Address Change table. You can review address changes in this table by selecting *Previous Address* at a work with customer sold-to scan screen; see [Reviewing Customer Address Changes](#). The system also writes a line in the Customer Notes table about the nature of the change and the date.
- A pop-up window opens if the Sold-to customer is linked to a permanent Bill-to account and the Update Bill-to Address with Sold-to Address Changes system control value is

selected. The pop-up window allows you to apply the Sold-to address changes to the Bill-to address. See [Display/Update Bill to Screen](#).

On the first Change Customer Sold To screen, you can change all the fields except the customer number, match code, or entered date.

On the second Change Customer Sold To screen, you can change all the fields except the customer number, customer name, original source code, or original mail type.

Display/Update Bill to Screen

Purpose: Use this screen to update a Bill-to address when you make changes to its linked Sold-to address.

You can also update bill-to address changes with sold-to address changes in the MBS Work table if the old address of the sold-to customer is an exact match of the old address of the bill-to customer. The MBS Work table includes address information from the National Change of Address (NCOA) Service. See [Loading Address Updates](#).

The system creates a permanent Bill-to record for a Sold-to customer when the person being billed for the order is different from the customer who placed the order.

See [Creating and Updating Bill-to Customers \(WCBT\)](#).

How to display this screen: You advance to this screen whenever you make a change to a customer linked to a bill-to account in customer maintenance or order entry if the [Update Bill-to Address with Sold-to Address Changes \(E13\)](#) system control value is *selected*. See [First Create Sold To Customer Screen](#) for field descriptions.

Completing this screen: This screen displays the name and address of the Sold-to customer with its changes in the upper half of the window, and its linked Bill-to record without the changes in the bottom half of the window.

Select *Accept* to update the Bill-to address with the changes made to the Sold-to address; otherwise, select *Reject*.

The following Bill-to fields update when you change their linked Sold-to customer fields:

- prefix
- first name
- middle initial
- last name
- suffix
- company
- street
- apt/suite
- address line 2
- address line 3
- address line 4
- postal code
- city
- state
- country

- delivery code
- PO box
- day phone number/extension
- eve phone number/extension
- mobile or fax phone number/extension

More Customer Sold To Options Screen

Purpose: Use this screen to advance to additional options available when working with a sold to customer.

How to display this screen: Select *More options* at the [First Create Sold To Customer Screen](#), the [Second Create Customer Sold To Screen](#), or the related change or display customer maintenance screens.

Option	Procedure
Work with customer email addresses	Select <i>Customer Email Addresses</i> to advance to the Work with Customer Email Address Screen .
Work with customer email correspondence	Select <i>Customer Email Correspondence</i> to advance to the Work with Email by Customer Sold To Number Screen .
Work with customer address change history	Select <i>Customer Address Change History</i> to advance to the Display Address Changes Screen .
Work with customer user-defined fields	Select <i>Customer User Defined Fields</i> to advance to the Work with User Fields Screen .
Work with ticklers associated with the sold to customer	Select <i>Work with Ticklers</i> to advance to the Work with Ticklers Screen (sold to customer view) .
Work with customer ownership	Select <i>Customer Ownership</i> . • If the customer is currently associated with customer ownership records, you advance to the Work with Customer Ownership Screen. • If the customer is currently not associated with customer ownership records, you advance to the Create Customer Ownership Screen.
Work with alternate customer number cross references	Select <i>Work with Alternate Customer Cross Reference</i> to advance to the Work with Alternate Customer # Screen . See Working with Alternate Customer Number Cross-References for an overview.
Review promotions for which the customer is eligible	Select <i>Customer Promotions</i> to advance to the Display Customer Promotions Screen , where you can review promotions for which the customer is eligible through direct customer assignment and advance to subsequent screens providing information on promotions.
Review one-time use promotions applied to the customer's orders	Select <i>One Time Use Promotions</i> to advance to the Display One Time Use Promotions Screen .

Option	Procedure
Review the customer's loyalty account information	Select <i>Loyalty Account</i>. When you select this option, the system retrieves the sold to customer's information from Oracle Retail Customer Engagement. • If Oracle Retail Customer Engagement finds a loyalty card assigned to the customer, the system advances you to the Display Loyalty Account Screen. If more than one loyalty card is assigned to the customer in Oracle Retail Customer Engagement, the system displays loyalty account information for the first card assigned to the customer. • If Oracle Retail Customer Engagement does not find a loyalty card for the customer, the system advances you to the Customer Loyalty Registration Window, where you can select to enroll the customer in the Oracle Retail Customer Engagement Loyalty program. • If a Relate ID is not defined for the customer in the Customer Sold To table, the system displays an error message similar to the following: This customer does not have a Loyalty card. • If a connection could not be made to Oracle Retail Customer Engagement, the system displays an error message similar to the following: Unable to connect to ORCE.

 Note:

This option displays only if the [Use ORCE Loyalty \(M06\)](#) system control value is selected; see [Customer Engagement Loyalty Integration](#).

Review the customer's purchase history from Oracle Retail Customer Engagement

Select *Purchase History*. When you select this option, the system retrieves the sold to customer's information from Oracle Retail Customer Engagement and advances you to the [Display Purchase History Screen](#) where you can review the completed sales and returns transactions from Oracle Retail Customer Engagement.

If a connection could not be made to Oracle Retail Customer Engagement, the system displays an error message similar to the following: Unable to connect to ORCE.

 Note:

This option displays only if the [ORCE Customer Integration \(L37\)](#) system control value is set to *INTERACT*; see [Customer Engagement Purchase History Integration](#).

Work with Ticklers Screen (sold to customer view)

Purpose: Use this screen to review, work with, and resolve ticklers associated with a sold to customer.

Secured feature: If you do not have authority to the [Update All Ticklers \(B09\)](#) secured feature, you cannot update a tickler that is not assigned to you or your tickler groups or an error message indicates: `Not authorized to change`.

This secured feature controls updating a tickler by:

- selecting *Change* for a tickler to change it.
- selecting *Delete* for a tickler to delete it.
- selecting *In process* for a tickler to assign the tickler to yourself.
- selecting *Resolve* for a tickler to resolve it.

If you do not have access to this feature, you can update only ticklers assigned to you or your tickler groups. However, you can still release an order associated with the tickler from hold.

See [Workflow Management Overview and Setup](#) for an overview and required setup for workflow management processing.

How to display this screen:

- select *Cust sold to* at the [Work with Ticklers Screen \(order view\)](#).
- select *Ticklers* at the [Customer Workflow Management Window](#) (which opens when you advance to the [Changing Sold To Customers](#) screen or [Select Orders For Return Authorization Screen](#).
- select the Work with Ticklers option from the [More Customer Sold To Options Screen](#).

Field	Description
Sold to	The number and description of the sold to customer associated with the ticklers on this screen. Sold to number: Numeric, 9 positions; display-only. Sold to description: Alphanumeric, 40 positions; display-only.
S (tickler status)	The status of the tickler. Valid values: • <i>Open</i> = Open; the tickler is open and is available to work on in the assigned tickler work queue. • <i>In Process</i> = In process; the tickler is currently being worked on by the assigned user. • <i>Resolved</i> = Resolved; the tickler has been resolved. Optional.
P (tickler priority)	The priority of the tickler, indicating how important the issue associated with the tickler is to resolve (1 is the lowest priority and 9 is the highest priority). Numeric, 1 position; optional.
Assigned (assign date)	The date the tickler was assigned to the user or tickler user group. Numeric, 7 positions (in user date format); optional.

Field	Description
Ev (tickler event code)	The code for the tickler event that created the tickler. Valid values: • <i>BO</i> = Backorders • <i>CO</i> = Cancelled orders • <i>HO</i> = Held orders • <i>MN</i> = Manually created • <i>NO</i> = New orders • <i>OO</i> = Aged open orders • <i>SO</i> = Sold out orders • <i>UP</i> = Unconfirmed pick tickets • <i>VP</i> = Voided pick tickets • <i>WF</i> = Remote workflow See System Delivered Tickler Events. Alphanumeric, 2 positions; optional.
Cat (tickler category)	The tickler category assigned to the tickler. Tickler categories are defined in and validated against the Tickler Category table; see Working with Tickler Category (WTCT). Alphanumeric, 3 positions; optional.
Tickler#	The tickler number assigned to the tickler, from the Tickler Number number assignment record. Numeric, 9 positions; optional.
User group	The group ID of the tickler user group assigned to the tickler. Tickler user groups are defined in and validated against the Tickler User Group table; see Working with Tickler User Groups (WTUG). Tickler group ID: Alphanumeric, 10 positions; display-only.
User	The user ID of the user assigned to the tickler. Users are defined in and validated against the User table; see Working with User Records (WUSR). User ID: Alphanumeric, 10 positions; display-only.
Sts (order status)	The status of the order. Valid values: • <i>blank</i> = open • <i>A</i> = archived to optical disk. This option is not currently implemented. • <i>C</i> = cancelled • <i>H</i> = held Note: The system highlights the held status in a different color (for example fuchsia) if the sold to customer is a new customer, based on purchase history. A new customer has placed an order, but no orders have shipped (# orders LTD is equal to or greater than 1 and # sales LTD is equal to 0 in the Customer Sold To Order History table). • <i>P</i> = purged • <i>S</i> = suspended • <i>X</i> = closed Alphanumeric, 1 position; display-only.
Order #	The order associated with the tickler. Numeric, 9 positions; display-only.
Bill to	The bill to customer associated with the tickler. Numeric, 9 positions; display-only.

Screen Option	Procedure
Change a tickler	Select <i>Change</i> for a tickler to advance to the Change Tickler Screen .
Delete a tickler	Select <i>Delete</i> for a tickler to delete it. You can only delete <i>MN</i> (manually created) ticklers.
Display a tickler	Select <i>Display</i> for a tickler to advance to the Display Tickler Screen. See the Change Tickler Screen for field descriptions.
Release the order associated with the tickler from hold	Select <i>Release</i> for a tickler to advance to the Release Reason Prompt Pop-Up Window (order header hold), Release Recipient Hold Reason Pop-Up Window (recipient hold), and/or Release Order Payment Method Window (pay type hold). If you release an order from hold for an <i>HO</i> (held order) tickler, the system automatically resolves the tickler. Also, the system evaluates any other ticklers associated with the order to determine if they can be resolved. If you select <i>Release</i> for a tickler not associated with a held order, an error message indicates: Order not on hold. If you select <i>Release</i> for a tickler not associated with an order, an error message indicates: Tickler not eligible for this option.
	 Note: You must have authority to the Release Held Orders menu option to release the order from hold.
Select a tickler to work on	Select <i>In process</i> for a tickler to change the status of the tickler from open (<i>O</i>) to in use (<i>I</i>). You can only select to work with a tickler that is in an open status; if you select <i>In process</i> for a tickler that is in an in use (<i>I</i>) or resolved (<i>R</i>) status, an error message indicates: Tickler status cannot be changed - resolved or already in process. Selecting this option automatically assigns the tickler to the user and creates a tickler history record.
Enter or review tickler work notes	Select <i>Notes</i> for a tickler to advance to the work notes screen, based on the note type defined for the tickler. Note type <i>A</i> advances you to the Edit Customer Actions Window. Note type <i>B</i> advances you to the Work with Bill To Notes Screen. Note type <i>O</i> advances you to the Work with Order Messages Screen. Note type <i>S</i> advances you to the Edit Customer Notes Screen. Note type <i>T</i> advances you to the Work with Tickler Notes Screen.

Screen Option	Procedure
Review the tickler source	Select <i>Detail</i> for a tickler to advance to the source screen, based on the tickler event associated with the tickler. <i>BO, CO, HO, NO, OO, SO, UP, VP, and WF</i> ticklers advance you to the Order Inquiry Header Screen. You cannot view the source for <i>MN</i> ticklers: Requested tickler has no source reference.
Review tickler history	Select <i>History</i> for a tickler to advance to the Work with Tickler History Screen .
Resolve a tickler	Select <i>Resolve</i> for a tickler to advance to the Resolve Tickler Window .
Review procedures for a tickler	Select <i>Procedure</i> for a tickler to advance to the Work with Tickler Event Rule Procedure Screen. You cannot add or change tickler procedures when you advance from the Work with Tickler screen. You cannot review procedures for <i>MN</i> ticklers.
Create a tickler for the <i>MN</i> (manually created) tickler event	Select <i>Create</i> to advance to the Create Tickler Screen .

 Note:

To create a *MN* tickler, you must have authority to the [Create Manual Tickler \(B13\)](#) secured feature.

Review the number of ticklers in the work queue, based on the selection criteria you have defined	Select <i>Count</i> to advance to the Current Tickler Count Window .
Toggle between displaying open and in use ticklers or resolved ticklers	Select <i>Open/Resolved</i>. The system toggles between displaying: • ticklers in an open or in process status. • tickler in a resolved status.

Display Customer Promotions Screen

Purpose: Use this screen to review promotions for which the customer is eligible through direct customer number assignment, or advance to subsequent screens providing more information on promotions for which the customer is eligible.

 Note:

This screen does not display all promotions for which the customer might be eligible through source code, offer, order total, or other criteria; it lists promotions only if the customer is assigned directly by customer number.

For more information: See [Working with Promotions \(WPRO\)](#).

How to display this screen: Select *Customer Promotions* at the [More Customer Sold To Options Screen](#).

Field	Description
Promotion	A code to identify a promotion for which the customer is eligible through direct customer number assignment. Alphanumeric, 7 positions; optional.
Description	The description of the promotion. Alphanumeric, 30 positions; display-only.
Start date	The date when the promotion first becomes effective. Numeric, 6 positions (in user date format); display-only.
End date	The last date when the promotion is effective. Numeric, 6 positions (in user date format); display-only.
Type	The type of promotion. Valid values are: • <i>Additional freight</i> • <i>BOGO</i> • <i>Freight</i> • <i>Item Category</i> • <i>Order</i> • <i>Tiered discount</i> • '' = messaging or reporting promotion Display-only.

Option	Procedure
Display promotions for which the customer is eligible through a customer price group	Select <i>Promotions by Price Group</i> to advance to the Display Customer Price Group Promotions Screen .

**Note:**

This option is available only if the customer is assigned to a customer price group that is assigned to a promotion.

Display or work with all promotions Select *Promotions* to advance to the [Work with Promotions Screen](#).

Display Customer Price Group Promotions Screen

Purpose: Use this screen to review promotions for a customer price group. When you display this screen through:

- **Work with Customers:** This screen is available only if the customer is eligible for one or more promotions through customer price group assignment.



Note:

This screen does not display promotions for which the customer is eligible through other criteria besides customer price group. Promotions for which the customer is eligible through direct customer number assignment are listed at the [Display Customer Promotions Screen](#). Other promotions for which the customer might be eligible through other criteria, such as source code, offer, or total order value, are not listed at either of these screens.

- **Work with Customer Price Group:** This screen displays promotions to which the customer price group is assigned.

For more information: See [Working with Promotions \(WPRO\)](#).

How to display this screen:

- Select *Promotions by Price Group* at the [Display Customer Promotions Screen](#).
- Select *Promotions* for a customer price group at the [Work with Customer Price Groups Screen](#).

Field	Description
Promotion	A code to identify a promotion for which the customer you are reviewing is eligible through customer price group assignment, or to which the customer price group you are reviewing is assigned. Alphanumeric, 7 positions; optional.
Description	The description of the promotion. Alphanumeric, 30 positions; display-only.
Start date	The date when the promotion first becomes effective. Numeric, 6 positions (in user date format); display-only.
End date	The last date when the promotion is effective. Numeric, 6 positions (in user date format); display-only.
Type	The type of promotion. Valid values are: • <i>Additional freight</i> • <i>BOGO</i> • <i>Freight</i> • <i>Item Category</i> • <i>Order</i> • <i>Tiered discount</i> • '' = messaging or reporting promotion Display-only.

Option	Procedure
Display or work with all promotions	Select <i>Promotions</i> to advance to the Work with Promotions Screen .

Display One Time Use Promotions Screen

Purpose: Use this screen to review the one-time-use promotions used by the customer.

About one-time-use promotions: You can use the [Use once](#) field to flag a promotion for one-time use, indicating that a customer cannot use the same promotion to discount more than one order. You can also override the one-time-use restriction in order entry if you have the required authority under the [Override One Time Use Promotion \(J08\)](#) secured feature. See [Working with Promotions \(WPRO\)](#) for more general information on promotions, and see [Cautions for One-Time-Use Promotions](#) for additional notes.

How to display this screen: Select the *One Time Use Promotions* option at the [More Customer Sold To Options Screen](#).

Field	Description
Customer	A number to identify the customer, the customer's name, and the company name, if any. Customer number: numeric, 9 positions; display-only. Customer company and name: alphanumeric, 41 positions; display-only.
Date	The order date, which might differ from the entered date. Numeric, 6 positions (in user date format); display-only.
Order #	A unique number assigned by the system to identify the order and ship-to. Order number: numeric, 8 positions; display-only. Ship-to: numeric, 3 positions; display-only.
Promotion	The code identifying the promotion. A promotion is listed on this screen for each order on which it was applied. Promotion codes are defined in and validated against the Promotion table; see Working with Promotions (WPRO) for more information. Alphanumeric, 7 positions; display-only.
Description	The description of the promotion, as set up through Working with Promotions (WPRO) . Alphanumeric, 30 positions; display-only.
Type	The type of promotion. Possible types are: • Additional freight • BOGO • Freight • Item Category • Order • Tiered discount See Working with Promotions (WPRO) for a discussion of each type.

Introducing Return Authorizations (WRTA)

Purpose: The Work with Return Authorizations (WRTA) menu option processes returns in three stages:

- Creating the return authorization record
- Receiving the returned merchandise
- Crediting the return

The stages in the return authorization process are explicit; in this way, the return authorization menu option provides you with greater efficiency and control.

You might prefer to use the Work with Return Authorization menu option to process returns if you need different staff members in different locations to perform updates separately, or to enable staff to process returns without giving them authority to the additional functionality in order maintenance.

Secured features: A separate secured feature controls the ability to perform each step of the return process. For example, an operator might have authority to create and receive a return, but not to perform the credit.

- [Enter Return Authorization \(A28\)](#)
- [Receive Return Authorization \(A29\)](#)
- [Credit Return Authorization \(A34\)](#)

Standard or streamlined return processing: The [Use Streamlined Return Authorizations \(F44\)](#) system control value controls whether you must perform the create, receipt, and credit as separate steps, or whether the return is automatically processed as far as your authority extends.

Return authorization download triggers: If the [Create Return Download Triggers \(K28\)](#) system control value is *selected*, the system creates a return authorization download (RAD) trigger when you create, change, or delete a return authorization line in the Work with Return Authorizations (WRTA) menu option, based on the trigger rules defined for the Return Authorization Download (RETURN_OUT) integration layer job. The RETURN_OUT integration layer job monitors for return authorization download triggers and generates a Return Authorization Outbound XML Message (CWReturnRAOut) to send the return authorization information to a remote system.

Retail pickup or delivery orders: You can process a return against a retail pickup or delivery order; however, shipping the order deactivates the [Order Broker Payment Type \(K98\)](#) applied to these orders, so you would then need to enter a new payment method in order to process the related refund.

**Note:**

You cannot process an exchange against a retail pickup or delivery order.

The system does not send a status update to Order Orchestration when you process a return against a retail pickup or delivery order.

See [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for an overview.

Store pickup orders: You cannot process a return against a store pickup order. See [Store Pickup Orders](#) for an overview.

Pick slip preparation: When you select an order for return authorization, the system removes any pick slip preparation from the order. When you accept or reject the return authorization, the system determines if the order qualifies for pick slip preparation and reapplies it to the order. If you add an exchange item to the order, the system performs pick slip preparation for the exchange item when you receive the return authorization. See [Preparing Orders for Pick Slip Generation](#).

Credit card net exchange billing: If the [Use CC Net Exchange Billing \(M23\)](#) system control value is selected and the order contains a credit card pay type, the system may hold the credit invoice for the return to net it against the debit invoice for the associated exchange in order to reduce the number of transactions that occur for an exchange; see [Credit Card Net Exchange Billing](#).

In this topic: This topic presents a conceptual overview of the return authorization process, briefly discussing each stage and its effect on system tables:

- [Understanding the Return Authorization Process](#)
- [Standard Return Authorization Process](#)
- [Streamlined Return Authorization Process](#)
- [Posting Returns Outside of Work with Return Authorizations](#)

Understanding the Return Authorization Process

Three stages: Before reviewing your different options in processing returns through the return authorization options, it is important to understand the three stages of a return. These three stages occur "behind the scenes" when you process a return through order maintenance; however, the return authorization options allow you to separate and control them.

Stage 1: Creating the return: The first step in processing a return is to create the return authorization record. This occurs whenever you process a return through either Work with Return Authorizations or order maintenance; however, in order maintenance, it occurs automatically "behind the scenes." At this point, the system also writes a message to order history.

- *Return or exchange:* The return authorization can be either a straight return (specify a return reason code), or an exchange (specify an exchange reason code).
- *Exchange item information:* When you process an exchange you need to supply information about the exchange item. The [Require Exchange Item at Time of Receipt \(F42\)](#) system control value controls the point when you must supply this information (that is, at the time of creating or receiving the return).
- *Multiple returns against an order line:* You can process multiple returns or exchanges against the same order line. For example, if a customer returns one unit because it is defective and wishes to exchange another unit for a different color, you can create two separate return authorizations for the item using a return reason code and an exchange reason code. Similarly, if the customer is returning two units for two different reasons, you can create two separate return authorizations for the item using the different return reason codes.
- *Returning the entire order:* You can also create a return authorization against all shipped, unreturned items on the order at once.

Stage 2: Receiving returned merchandise: The second step in processing the return is to receive the returned item into your warehouse. At this point, the receipt is processed through the ORDR_ASYNC job, which updates:

- inventory for the item, including increasing on-hand in the item location and item warehouse, and adding an inventory transaction history record
- the order, including the order detail and order line history
- in the case of an exchange, adds the exchange item to the order
- in the case of a misshipped item, adds the returned item to the order
- the return authorization header and detail

Adding an exchange item to the order: When you process an exchange, adding the exchange item reopens the order if it was closed. Adding a new line causes the order to move through the normal processing routines, which may cause the order to go on hold if, for example, the exchange item has a higher price and the customer paid by check. See [Releasing Held Orders](#).

Stage 3: Processing the credit: The third and final step in processing the return is to credit the customer for the return. At this point, the credit is processed through the ORDR_ASYNC and BILL_ASYNC jobs, which update:

- the order, including order history, and creating the credit invoice and refund, if appropriate
- the return reason or exchange reason history for the offer
- the return authorization header and detail record.

**Note:**

Refunds can be either positive (you owe the customer money) or negative (the customer owes you money).

Standard Return Authorization Process

Summary: If the [Use Streamlined Return Authorizations \(F44\)](#) system control value is *unselected*, the return authorization process after you select an order consists of:

1. creating one or more return authorizations
2. receiving the return(s) as a separate step
3. crediting the return(s) as a separate step

You can perform all three steps through the Work with Return Authorization menu option. You can also perform the receipt and credit separately, using the [Receiving Returns \(WRAR\)](#) and [Crediting Returns \(WRAC\)](#) menu options respectively.

For more information:

- [Selecting Orders for Return \(WRTA\)](#)
- [Working with Return Authorizations: Standard Process](#)

Streamlined Return Authorization Process

Summary: If the [Use Streamlined Return Authorizations \(F44\)](#) system control value is *selected*, the return authorization process after you select an order consists of selecting one or more items to return or exchange. At this time, the return is processed as far as your authority extends. For example, if you have create and receive but not credit authority, the return is automatically created and received at this time.

Once a return authorization has been created, or created and received, by one operator, another operator with greater authority must complete the return authorization processing.

For more information:

- [Selecting Orders for Return \(WRTA\)](#)
- [Working with Return Authorizations: Standard Process](#)
- [Working with Return Authorizations: Streamlined Process](#)
- [Receiving Returns \(WRAR\)](#)
- [Crediting Returns \(WRAC\)](#)

Posting Returns Outside of Work with Return Authorizations

You can post returns outside of the Work with Return Authorizations (WRTA) menu option using the following methods.

- [Posting Returns in Order Entry](#)
- [Posting Returns using the Order API](#)
- [Posting Returns in Order Maintenance](#)
- [Posting Returns using the Inbound Return API](#)

Posting Returns in Order Entry

You can post a return in order entry by entering an order line with a negative quantity for the number of units of the item being returned.

When you post a return in order entry, the system performs the following updates:

Table	Description
RA Header table	Creates a record in the RA Header table unless the Use Streamlined Return Authorizations (F44) system control value is <i>selected</i> and the Create Return Download Triggers (K28) system control value is <i>unselected</i> .
RA Detail table	Creates a record for each negative order line on the order in the RA Detail table if the Create Return Download Triggers (K28) system control value is <i>selected</i> .
WRTA	Displays the posted return in the Work with Return Authorizations (WRTA) menu option only if the Use Streamlined Return Authorizations (F44) system control value is <i>unselected</i> and the Create Return Download Triggers (K28) system control value is <i>selected</i> . The return is entered, received, and credited.
RAD Trigger	Creates a return authorization download (RAD) trigger for each order line returned if the Create Return Download Triggers (K28) system control value is <i>selected</i> .

For more information: See [Posting a Return or Exchange Through Order Entry](#) for an overview and instructions.

Posting Returns using the Order API

You can post a return through the Order API by entering an order line with a negative quantity for the number of units of the item being returned.

When you post a return through the Order API, the system performs the following updates:

Table	Description
RA Header table	Creates a record in the RA Header table unless the Use Streamlined Return Authorizations (F44) system control value is <i>selected</i> and the Create Return Download Triggers (K28) system control value is <i>unselected</i> .
RA Detail table	Creates a record for each negative order line on the order in the RA Detail table if the Create Return Download Triggers (K28) system control value is <i>selected</i> .

Table	Description
WRTA	Displays the posted return in the Work with Return Authorizations (WRTA) menu option only if the Use Streamlined Return Authorizations (F44) system control value is <i>unselected</i> and the Create Return Download Triggers (K28) system control value is <i>selected</i> . The return is entered, received, and credited.
RAD Trigger	Creates a return authorization download (RAD) trigger for each order line returned if the Create Return Download Triggers (K28) system control value is <i>selected</i> .

For more information: See *Processing a Return* in the *Generic Order Interface (Order API)* for an overview and instructions.

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

Posting Returns in Order Maintenance

You can post a return in order maintenance by selecting *Return* for an order line (to return an individual item) or by selecting *Return Order* for the order (to return the entire order).

When you post a return in order maintenance, the system performs the following updates:

Table	Description
RA Header table	Creates a record in the RA Header table for the posted return. The RA is entered, received, and credited.
RA Detail table	Creates a record for each order line returned in the RA Detail table. The RA detail is returned and credited.
WRTA	Displays the RA and RA lines in the Work with Return Authorizations (WRTA) menu option. The RA is entered, received, and credited. If the Use Streamlined Return Authorizations (F44) system control value is <i>selected</i> , the RA displays only if there are remaining lines on the order that are eligible for return. In addition, you cannot view the RA lines.
RAD Trigger	Creates a return authorization download (RAD) trigger for each order line returned if the Create Return Download Triggers (K28) system control value is <i>selected</i> .

In addition, you can also post a return in order maintenance by entering an order line for a negative quantity for the number of units being returned; see [Posting Returns in Order Entry](#) for more information on the updates that occur for a negative order line.

For more information: See [Returning and Exchanging Items in Order Maintenance](#) for an overview and instructions.

Posting Returns using the Inbound Return API

You can use the *Inbound Return API* to create and process a return against an order detail line, based on a *Return Request Message (CWReturnIn)* received from an external system.

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

When you post a return through the inbound Return API, the system performs the following updates:

Table	Description
RA Header table	Creates a record in the RA Header table for the posted return.
RA Detail table	Creates a record for each order line returned in the RA Detail table.
WRTA	Displays the posted return in the Work with Return Authorizations (WRTA) menu option. The return is entered, received, and credited.
RAD Trigger	Does not create a return authorization download (RAD) trigger, regardless of the setting of the Create Return Download Triggers (K28) system control value.

For more information: See *Inbound Return API* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for an overview and instructions.

Using the Order Inquiry Scan Screens (OIOM)

Purpose: You use Order Inquiry primarily when you want to answer questions about an order, such as:

- What is the status of the order?
- What is the status of an item on the order? Has the item shipped?
- Why is the order on hold?
- What was the reason for an exchange?
- What form of payment was used for an order?
- When is a backordered item expected to be available to ship?

Quotes: You can also use Order Inquiry to review quotes; see [Entering Pre-Order Quotes](#) for an overview and required setup.

All Order Inquiry screens use display mode, which means that you cannot change the information you see on these screens. However, if you have the appropriate authority, you can switch to Order Maintenance to update an order.

In this topic:

- [Order Inquiry Scan Screen](#)
 - [Cross-Company Scanning](#)
- [Advancing from the Initial Order Inquiry Scan Screen](#)
 - [Scan Screens by Customer](#)
 - [Scan Screens by Order](#)
- [Scanning Paths by Field](#)
- [Customer Sold To Scan Screens](#)
- [Order Scan Screens](#)
- [Display Customer Sold To Screen \(Reviewing Summary Information\)](#)

Order Inquiry Scan Screen

Use this screen to find a quote or order using whatever information you have. This screen is your principle point of access to the Order Inquiry function.

How to display this screen: Enter *OIOM* in the Fast path field on any menu or select Order Inquiry/Order Maintenance from a menu.

How to scan: You can use any field on the Order Inquiry scan screen to help you find the quote or order you want. For example, if you enter an order status of *Closed*, you advance to a screen that lists all closed orders. If you enter a customer's last name, a screen displays that lists customers alphabetically starting with the name you entered.

Each of the fields available for scanning at the [Order Inquiry Scan Screen](#) is unique, but the scanning process falls into one of three main groups:

1. initially scanning based on what you know about the customer, then selecting one of that customer's quotes or orders. See [Scan Screens by Customer](#).
2. scanning based on what you know about the quote or order itself. See [Scan Screens by Order](#).
3. entering exact information about a quote or order, such as the quote or order number, invoice number, or exact tracking number, which brings you directly to the [Order Inquiry Header Screen](#).

Retaining scan entries: If you enter a quote or order number in the Order # field, you advance directly to the quote or order; when you return to the Order Inquiry Scan screen the quote or order number you entered and the customer sold to number associated with the quote or order displays on the screen, allowing you to scan for other quotes or orders associated with the customer.

Example: If you enter order number 5600 in the Order number field, the system advances you to the Order Inquiry Header screen where you can review the sold to customer on the order (in this example, sold to customer 6 is associated with the order). If you return to the Order Inquiry Scan screen, order number 5600 displays in the Order # field and customer sold to number 6 displays in the Sold to customer field.

**Note:**

The system does not retrieve the sold to customer number for any other scan fields on the Order Inquiry Scan screen; for example if you scan for a quote or order by order status, the system does not display the sold to customer number when you return to the Order Inquiry Scan screen. Additionally, the system retrieves the quote or order number and sold to customer number only if you select *Cancel* to return to the Order Inquiry Scan screen; if you select *Exit*, the system does not display the quote or order number and sold to customer number on the Order Inquiry Scan screen.

Cross-Company Scanning

If you are working within a company set up for cross-company scanning, you can scan for customers in any other company that has a similar setup in the Company table. (See [Working with Companies \(WCMP\)](#) for more information on working with companies.)

You can scan for customers across companies with these fields:

- Postal code
- Match code
- Postal code, restricted by Company name
- Postal code, restricted by Customer name

When you scan on any of these fields, you advance to a subsequent customer scan screen displaying information, including the company code, of customers that match your entry. You cannot scan by Company name or Customer name alone; however, you can restrict your scan on Postal code by your entry in either field.

If you advance to Order Inquiry for a customer from a different company, all of the system control values from the new company will be in effect. You can review the order or perform Order Maintenance. When you exit the order, you will return to your default company.

Field	Description
Order #	A combination of quote or order number and ship to record number. The system assigns a unique number to every quote and order created through Order Entry. To scan on this field, enter a valid quote or order number and, optionally, a ship to number. You advance directly to the Order Inquiry Header Screen for this quote or order. If you return to the Order Inquiry Scan screen after reviewing the quote or order, the quote or order number you entered and the customer sold to number associated with the quote or order displays on the screen. <i>Example:</i> If you enter order number 5600 in the Order number field, the system advances you to the Order Inquiry Header screen where you can review the sold to customer on the order (in this example, sold to customer 6 is associated with the order). If you return to the Order Inquiry Scan screen, order number 5600 displays in the Order # field and customer sold to number 6 displays in the Sold to customer field.

**Note:**

The system does not retrieve the sold to customer number for any other scan fields on this screen; for example if you scan for an order by order status, the system does not display the sold to customer number when you return to the Order Inquiry Scan screen. Additionally, the system retrieves the quote or order number and sold to customer number only if you select *Cancel* to return to the Order Inquiry Scan screen; if you select *Exit*, the system does not display the quote or order number and sold to customer number on the Order Inquiry Scan screen.

Order number: numeric, 8 positions; optional.

Ship-to number: numeric, 3 positions; optional.

It is common to use the Postal code, Last name, First name, and Company name fields together when searching for a quote or order. For example, you may want a listing of orders for a specific postal code and last name.

Field	Description
Postal code	The customer's postal or zip code. - Enter a full or partial postal code or postal code and company name to advance to the Scan Sold To by Postal Code/Company screen. This screen lists all customers by postal code in ascending (lowest to highest) numeric sequence, beginning with the code you entered. - Enter a full or partial postal code and last name or postal code, last name, and company name to advance to the Scan Cust Sold To by Postal Code screen. This screen lists all customers alphabetically beginning with the postal code you entered. See Customer Sold To Scan Screens. <i>Scan length:</i> The Postal Code Scan Length (F61) system control value controls how many characters of the postal code to use when searching for a customer. See that system control value for a discussion. You can scan for customers across companies with the postal code field if cross-company scanning is set up. See Cross-Company Scanning. Alphanumeric, 10 positions; optional.
Last name	The name of the customer who placed the quote or order. - Enter a full or partial last name or last name and first name to advance to a Scan Cust Sold To By Last Name screen. This screen lists all customers alphabetically beginning with the name you entered. - Enter a full or partial last name and postal code to advance to the Scan Cust Sold To by Postal Code screen. This screen lists all customers alphabetically beginning with the postal code you entered. See Customer Sold To Scan Screens. Alphanumeric, 25 positions; optional.
First name	The first name of the customer who placed the quote or order. - Enter the last name, first name, and postal code to advance to the Scan Customer Sold To by Postal Code screen. This screen lists all customers alphabetically beginning with the postal code you entered. - Enter a full last name and full or partial first name to advance to the Scan Cust Sold To By Last Name screen. This screen lists all customers alphabetically beginning with the name you entered.



Note:

First name must be used in conjunction with Postal code, Last name or with just Last name for scanning. You cannot scan on first name alone.

See [Customer Sold To Scan Screens](#).
Alphanumeric, 15 positions; optional.

Field	Description
Company name	The name of the company associated with the quote or order. - Enter a full or partial company name to advance to the Scan Cust Sold To By Company Name screen. This screen lists all customers alphabetically by company name, beginning with the name you entered. - Enter a postal code and company name to advance to the Scan Sold To by Postal Code/Company screen. This screen lists all customers by postal code in ascending (lowest to highest) numeric sequence, beginning with the code you entered. - Enter a postal code, last name, and company name to advance to the Scan Cust Sold To by Postal Code screen. This screen lists all customers alphabetically beginning with the postal code you entered. See Customer Sold To Scan Screens. Alphanumeric, 30 positions; optional.
Phone number	The customer's daytime, evening, or third (fax or mobile) telephone number. Enter information in one or more of the phone number fields to advance to the Scan Cust Sold To by Phone # screen. This screen lists customers in ascending order by phone number, beginning with the phone number you entered. See Customer Sold To Scan Screens. You can define a telephone number format for each country to map to the phone numbers operators enter into the system. See Setting Up the Country Table (WCTY). Note: Your entry should include any formatting specified by the telephone number format for the country; for example, if the telephone number format for the United States is (111) 111-111, your entry should include the parentheses and hyphen.
Pick control #	Alphanumeric, 14 positions; optional. A code the system assigns to each batch of pick slips. Enter a pick control number that has been billed to advance to the Scan Orders By Pick Control # screen. From this screen you can also use options to display the Invoice Detail and Invoice Detail Pay Methods screens. See Reviewing Financial Information on an Order.
Card number	Numeric, 7 positions; optional. The card number the customer used on the quote or order. Information will be provided by Oracle at a later date. Alphanumeric, 20 positions; optional.

Field	Description
User	The user ID of the person or process that created the quote or order. This is the Entered by field at the Order Inquiry Scan Screen. Enter a valid user ID or prompt to advance to the Scan by User screen. See Order Scan Screens. Entering a partial user ID is not supported. User ID's are defined in and validated against the User table. See Working with User Records (WUSR) for more information. Alphanumeric, 10 positions; optional.
Sold to customer	A unique number that identifies the customer who placed the quote or order. Enter a valid customer number to advance to the Scan Orders by Customer screen. If there is only one quote or order for this customer, you advance directly to Order Inquiry for the quote or order. See Order Scan Screens. If you scan for a quote or order by entering its number in the Order # field and then return to the Order Inquiry Scan screen after reviewing the quote or order, the number you entered and the customer sold to number associated with the quote or order displays on the screen. <i>Example:</i> If you enter order number 5600 in the Order number field, you advance to the Order Inquiry Header screen where you can review the sold to customer on the order (in this example, sold to customer 6 is associated with the order). If you return to the Order Inquiry Scan screen, order number 5600 displays in the Order # field and customer sold to number 6 displays in the Sold to customer field.
	 Note: The system does not retrieve the sold to customer number for any other scan fields on this screen; for example if you scan for an order by order status, the system does not display the sold to customer number when you return to the Order Inquiry Scan screen.
Sales rep # (Sales representative number)	<i>Ghost customers:</i> If you enter the customer number of a ghost customer, the scan screen does not display any quotes or orders; this is because a merge/purge has assigned any quotes or orders using that customer number to the "target" customer. You can identify a ghost customer by the setting of the Ghost flag. Numeric, 9 positions, assigned by the system; optional. A code that identifies your company's sales representative credited for the quote or order. Enter a valid sales representative number to advance to the Scan Orders by Sales Rep screen. This screen lists quotes and orders in ascending (lowest to highest) sequence by sales rep number, then by quote or order number and date, beginning with the number you entered. See Order Scan Screens. Numeric, 7 positions; optional.

Field	Description
Alternate customer number	The alternate customer number defined for the customer who placed the quote or order. Alternate customer number is an additional number to identify the customer on the system, such as a customer number carried over from a system conversion. Enter an alternate customer number to advance to the Scan Customer by Alternate Cust # screen. This screen lists customers by alternate customer number. See Display Alternate Customer Cross Reference Window (184) for more information. <i>Alternate Customer Number Label Description:</i> The field label on this screen is based on the name you enter in the Alternate Customer Number Label Description (H95) system control value; if you do not enter a name in this system control value, the field label is Alt cust. <i>Example:</i> If you enter the field label name PC MEMBER# in the system control value, the field label on this screen is PC MEMBER#. Note: Scanning by the alternate customer number of a ghost customer is not currently implemented if the Display Alternate Customer Cross Reference Window (184) system control value is selected.
Recipient	Alphanumeric, 15 positions; optional. The last name of the customer who receives a gift order. This scan includes customers you add to an order using <i>Sold To/Recip</i>, not shipping addresses that you add to an order using <i>Ship To</i> or <i>Order Ship To</i>. Enter a full or partial name to advance to the Scan Orders For Recipients screen. This screen lists all customers in the Customer table, beginning with the name you have entered. Enter 1 next to a customer to find orders for which this customer was a recipient. See Customer Sold To Scan Screens.
Batch #	Alphanumeric, 25 positions; optional. A number that identifies a group of mail orders. Enter a batch number to advance to a Scan Orders by Batch # screen. This screen lists orders in ascending (lowest to highest) sequence by batch number, beginning with the number you entered. See Order Scan Screens.
Purchase order #	Numeric, 5 positions; optional. The purchase order number associated with the customer's quote or order. Enter a full or partial purchase order number to advance to a Scan Orders by Purchase Order Number screen. This screen lists purchase quotes and orders in ascending (lowest to highest) numeric sequence by order number. See Order Scan Screens.
Invoice #	Alphanumeric, 15 positions; optional. A number assigned to each shipment on an order. Enter an invoice number to advance to Order Inquiry for the order. Numeric, 7 positions; optional.

Field	Description
	It is common to use the Item, Order status, and Order date fields together when searching for a quote or order. For example, you may want a listing of open orders entered prior to a specific date that contain a specific item.
Order status	A code that describes the state of an order. Valid values: - Cancelled - Error - Held - Open - Purged - Quote - Suspended - Closed Scan options: - Enter a valid order status code to advance to the Scan Orders by Order Status screen. This screen displays orders of the selected status in ascending (lowest to highest) order number sequence. - Enter a valid order status code and order date to advance to the Scan By Order Date screen. This screen lists quotes and orders in descending sequence (newest to oldest orders), beginning with the date you entered. - Enter a valid order status code and item/SKU to advance to the Scan By Order Items screen. This screen lists all quotes and orders that contain the item and SKU you entered. - Enter a valid order status code, item/SKU, and order date to advance to the Scan By Order Items and Date screen. This screen lists all quotes and orders that contain the item and SKU you entered in descending sequence (newest to oldest orders), beginning with the date you entered. See Order Scan Screens. Display-only.
Order date	The date the quote or order was entered. - Enter an order date or order date and order status to advance to the Scan Orders by Date screen. This screen lists quotes and orders in descending sequence (newest to oldest orders), beginning with the date you entered. - Enter an order date and item/SKU to advance to the Scan By Order Items and Date screen. This screen lists all quotes and orders that contain the item and SKU you entered in descending sequence (newest to oldest orders), beginning with the date you entered. See Order Scan Screens. Numeric, 6 positions (in user date format); optional.

Field	Description
Item/SKU	The code for the item and style of the item. • Enter a valid item code or item code and SKU code to advance to the Scan Orders by Item screen, which lists all quotes and orders that contain the item and SKU you entered. • Enter a valid SKU to advance to the Scan Orders by Item screen, which lists all quotes and orders that contain the item and SKU you entered. • Enter a valid item/SKU and order date, or item/SKU, order date, and order status, to advance to the Scan By Order Items and Date screen. This screen lists all quotes and orders that contain the item and SKU you entered in descending sequence (newest to oldest orders), beginning with the date you entered. See Order Scan Screens. Item: Alphanumeric, 12 positions; optional (required if scanning on SKU information). SKU: Alphanumeric, three 4-position fields; optional.
Order type	A code that identifies how an order was received, such as by telephone, mail, fax, or other methods. Enter a valid order type to advance to the Orders by Order Type screen. See Order Scan Screens. Alphanumeric, 1 position; optional.
Order cross ref #	The quote or order number, if any, that was passed through the <i>Generic Order Interface (Order API)</i> and used to identify the quote or order in an external system. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). In the case of a retail pickup or delivery order assigned through the Order Orchestration Integration, this is the order number in the system originating the order. If the originating system is Order Administration, the system prefaces the originating order number with the text <code>ORIG# :</code>. For example: <code>ORIG# : 9999-001</code>, where <code>ORIG# :</code> indicates the order originated in Order Administration, 9999 is the original order number in Order Administration, and 001 is the ship to number. This is the Alt ord displayed at the Display Order Properties Screen. Enter a full or partial order cross reference number to advance to the Scan by Order Cross Reference # screen. If you wish to review all retail pickup and delivery orders whose originating system is Order Administration, enter <code>ORIG# :</code> in the Order cross ref # field and select <i>OK</i> to advance to the Scan by Order Cross Reference # screen where all orders whose E-Commerce order number in the Order Header Extended table begin with <code>ORIG# :</code> display. See Order Scan Screens. Alphanumeric, 35 positions; optional.

Field	Description
Match code	A code comprised of elements of the customer's name and address, which is used to detect duplicate and fraud customers. Enter a full or partial match code to advance to the Scan Sold To Customer by Match Code screen. This screen lists customers alphabetically by match code, beginning with the code you entered. See Customer Sold To Scan Screens. You can scan for customers across companies with the match code field if cross-company scanning is set up. See Cross-Company Scanning. Alphanumeric, 15 positions; optional.
Country	The code for the customer's country. Country codes are defined in and validated against the Country table. Enter a full or partial country code to advance to the Scan Customer Sold To by Country screen. This screen lists all customers associated with the country code you entered. See Customer Sold To Scan Screens. Alphanumeric, 3 positions; optional.
E-mail address	An email address for the customer. When you enter a full or partial email address, you advance to the Scan Customer by E-mail Address screen, where you can scan by any email address on file for a sold to customer. This field is not case sensitive; an email address of <i>abc@example.com</i> matches an entry of <i>ABC@EXAMPLE.COM</i>, and vice versa. See Customer Sold To Scan Screens. Alphanumeric, 50 positions; optional.
Membership ID	A code identifying a membership program you use to generate periodic orders to a customer. Enter a full or partial membership ID to advance to the Orders by Membership ID screen, which lists orders that were generated through membership programs. See Order Scan Screens and Membership Overview. Alphanumeric, 12 positions; optional.
Tracking#	The number assigned by the shipper to track the shipment. This number is stored in the Manifest Upload Audit table. Enter a full or partial tracking number to advance to the Scan by Tracking # screen. If your entry is an exact match to a tracking number for an order, you advance directly to the order. See Order Scan Screens. Alphanumeric, 30 positions; optional.

Advancing from the Initial Order Inquiry Scan Screen

Process: Each of the fields available for scanning at the [Order Inquiry Scan Screen](#) is unique, but the scanning process falls into one of three main groups:

- initially scanning based on what you know about the customer, then selecting one of that customer's quotes or orders;
- scanning based on what you know about the quote or order itself;
- entering exact information about a quote or order, such as the quote or order number, invoice number, or exact tracking number, which brings you directly into Order Inquiry.

The processes for the first two types of scans are described below. See [Reviewing the Order Inquiry Header Screen](#) for more information on the Order Inquiry Header screen.

Scan Screens by Customer

You advance to a Customer Sold To scan screen if you enter full or partial information in one or more of the following fields at the initial Order Inquiry scan screen.

If you enter...	you advance to...
Postal code or Postal code and Company name Postal code and Last name or Postal code , Last name and Company name	Scan Sold To by Postal Code/Company screen
Last name or Last name and First name	Scan Cust Sold To by Postal Code screen
Company name	Scan Cust Sold To By Last Name screen
Phone number	Scan Cust Sold To by Company Name screen
Recipient	Scan Cust Sold To by Phone # screen
Alternate customer number	Scan Orders for Recipients screen
Match code	Scan Customer by Alternate Cust # screen
Country	Scan Customer Sold To by Match Code screen
E-mail address	Scan Customer Sold To by Country screen
	Scan Customer By Email Address screen



Note:

Customer scan screens do not display ghost customers, identified by the setting of the [Ghost](#) flag. These are customers who were merged during a merge/purge process.

From the customer scan screens, you can advance to the:

- [Customer Sold To Scan Screens](#):
- Scan Orders by Customer screen when you select *Select* for a customer (or go directly to Order Inquiry if the customer has only one quote or order)
- Ship To Customer Scan screen by selecting *Ship To's* (at a sold to or bill to customer scan screen)
- Bill To Customer Scan screen by selecting *Bill To* (at a sold to or ship to customer scan screen)
- Order Ship To Customer Scan screen by selecting *Scan Ord Ship To* (at a sold to, bill to, or ship to customer scan screen)
- [Display Customer Sold To Screen \(Reviewing Summary Information\)](#) when you select *Display* for a customer (at a customer sold to, ship to, or bill to scan screen)

Scan Screens by Order

You advance to a Scan Orders by screen when you scan on one or more of these fields on the initial Order Inquiry scan screen.

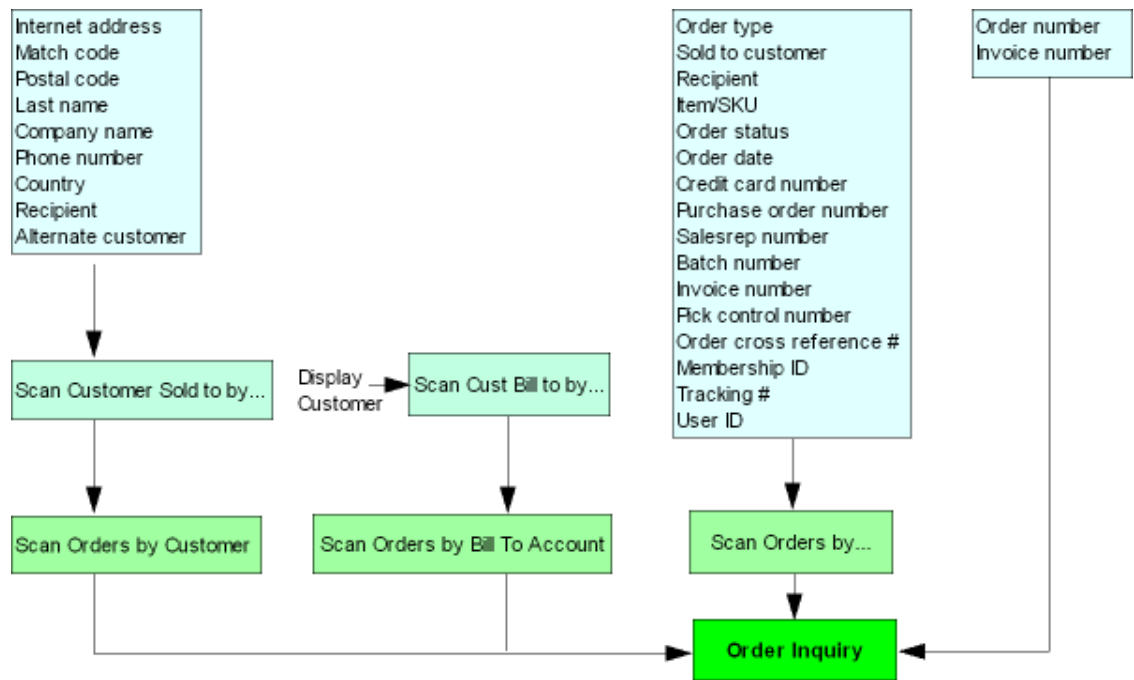
If you enter...	you advance to...
<i>Pick control #</i>	Scan Orders by Pick Control # screen
<i>User</i>	Scan By User screen
<i>Sold to customer</i>	Scan Orders By Customer screen
<i>Sales rep # (Sales representative number)</i>	Scan By Salesrep screen
<i>Batch #</i>	Scan By Batch # screen
<i>Purchase order #</i>	Scan By Purchase Orders screen
<i>Order status</i>	Orders By Order Status screen
<i>Order date</i>	Scan By Order Date screen
or	
<i>Order date</i> and <i>Order status</i>	
<i>Item/SKU</i>	Scan By Order Items screen
or	
<i>Item/SKU</i> and <i>Order status</i>	
<i>Item/SKU</i> and <i>Order date</i>	Scan By Order Items and Date screen
or	
<i>Item/SKU</i> , <i>Order date</i> and <i>Order status</i>	
<i>Order cross ref #</i>	Scan By Order Cross Reference # screen
<i>Membership ID</i>	Orders By Membership ID screen
<i>Tracking#</i>	Scan By Tracking # screen

See [Order Scan Screens](#). From an order scan screen you can advance to Order Inquiry by selecting *Select* for a quote or order. If the order you select has more than one shipping address, however, you may need to select a recipient order first.

Ghost customers: If you enter the customer number of a ghost customer, the scan screen does not display any quotes or orders; this is because a merge/purge has assigned any quotes or orders using that customer number to the “target” customer. You can identify a ghost customer by the setting of the [Ghost](#) flag.

Scanning Paths by Field

Flowchart: This chart illustrates the paths you can take from the [Order Inquiry Scan Screen](#).



Customer Sold To Scan Screens

Purpose: Customer Sold To scan screens list records in sequential numeric or alphabetical sequence based on your selection at the initial Order Inquiry scan screen. Use the Customer Sold to scan screens to select a particular customer for order inquiry. From this screen you can also perform customer ship to, customer bill to, and customer order ship to scans.

You can scan further on the Customer Sold To Scan screens by entering full or partial information in the open fields at the top of the screen.

- *Scan Sold To by Postal Code/Company screen:* When you first advance to the screen, the system defaults the values you entered in the [Postal code](#) and [Company name](#) fields on the [Order Inquiry Scan Screen](#) to the Postal Code and Company Name/Address fields. You can scan by postal code and company name/address.
- *Scan Cust Sold To by Postal Code screen:* When you first advance to the screen, the system defaults the values you entered in the [Postal code](#), [Last name](#) and [First name](#) fields on the [Order Inquiry Scan Screen](#) to the Postal Code, Last Name and First Name fields. You can scan by postal code, last name, and first name.
- *Scan Cust Sold To By Last Name screen:* When you first advance to the screen, the system defaults the values you entered in the [Last name](#) and [First name](#) fields on the [Order Inquiry Scan Screen](#) to the Customer Name/Address and First Name fields. You can scan by customer name/address and first name.
- *Scan Cust Sold To by Company Name screen:* When you first advance to the screen, the system defaults the value you entered in the [Company name](#) field on the [Order Inquiry Scan Screen](#) to the Company Name/Address field. You can scan by company name/address and customer number.
- *Scan Cust Sold To by Phone # screen:* When you first advance to the screen, the system defaults the value you entered in the [Phone number](#) field on the [Order Inquiry Scan Screen](#) to the Telephone # field. You can scan by phone type (day, eve, fax/mobile) and telephone number.
- *Scan Orders for Recipients screen:* When you first advance to the screen, the system defaults the value you entered in the [Recipient](#) field on the [Order Inquiry Scan Screen](#) to

the Customer Name/Address field. You can scan by customer name/address and first name.

- *Scan Customer by Alternate Cust # screen:* When you first advance to the screen, the system defaults the value you entered in the [Alternate customer number](#) field on the *Order Inquiry Scan Screen* to the Alt cust # field. You can scan by alternate customer number and company name.
- *Scan Customer Sold To Match Code screen:* When you first advance to the screen, the system defaults the value you entered in the [Match code](#) field on the *Order Inquiry Scan Screen* to the Match Code field. You can scan by match code.
- *Scan Customer Sold To by Country screen:* When you first advance to the screen, the system defaults the value you entered in the [Country](#) field on the *Order Inquiry Scan Screen* to the Cty field. You can scan by country code and name/address.
- *Scan Customer By Email Address screen:* When you first advance to the screen, the system defaults the value you entered in the [E-mail address](#) field on the *Order Inquiry Scan Screen* to the Email Address field. You can scan by email address.

How to display this screen: At the *Order Inquiry Scan Screen*, enter available information about a customer in the appropriate scan field; see [Scan Screens by Customer](#) for a list of fields that advance you to a Customer Sold To Scan screen.

Screen Option	Procedure
Select a specific customer	Select a customer to advance to the Scan Orders by Customer screen. (If there is only one quote or order for the customer, you advance directly to Order Inquiry.) See Order Scan Screens .
Display sold to customer summary information	Select <i>Display</i> for a customer to advance to the Display Customer Sold To Screen (Reviewing Summary Information) .
Advance to the Scan Customer Ship To screen	Select <i>Scan by Ship To</i> to advance to the Scan Customer Ship To By... screen.

 Note:

This option is not available on the following customer scan screens:

- Scan Orders for Recipient screen
- Scan Customer by Alternate Cust # screen

Screen Option	Procedure
Advance to the Scan Customer Bill To screen	Select <i>Scan by Bill To</i> to advance to the Scan Customer Bill To By... screen.  Note: This option is not available on the following customer scan screens: • Scan Orders for Recipient screen • Scan Customer by Alternate Cust # screen • Scan Cust Sold To by Country screen • Scan Customer By Email Address screen
Advance to the Scan Customer Order Ship To screen	Select <i>Scan by Order Ship To</i> to advance to the Scan Customer Bill To By... screen.  Note: This option is not available on the following customer scan screens: • Scan Cust Sold To Phone # screen • Scan Orders for Recipient screen • Scan Customer by Alternate Cust # screen • Scan Customer Sold To by Match Code screen • Scan Cust Sold To by Country screen • Scan Customer By Email Address screen

Order Scan Screens

Purpose: Use the order scan screens to obtain a list of quotes and orders and gain access to Order Inquiry for any quote or order listed. Order scan screens list records in numeric or alphabetical sequence based on the field you selected for scanning.

You can scan further on the Order Scan screens by entering full or partial information in the open fields at the top of the screen.

- *Scan Orders by Pick Control # screen:* When you first advance to the screen, the system defaults the value you entered in the *Pick control #* field on the *Order Inquiry Scan Screen* to the Control # field. You can scan by pick control number, order number, ship to number, and invoice number.
- *Scan By CC Last 4 screen:* When you first advance to the screen, the system defaults the value you entered in the *Card number* field on the *Order Inquiry Scan Screen* to the CC Last 4 field. You can scan by order number, order status, charge amount, and expiration date.
- *Scan Orders By Credit Card screen:* When you first advance to the screen, the system defaults the value you entered in the *Card number* field on the *Order Inquiry Scan Screen*

to the Card Number field. You can scan by card number last 4, order number, order status, charge amount, and expiration date.

- *Scan By User screen:* When you first advance to the screen, the system defaults the value you entered in the [User](#) field on the *Order Inquiry Scan Screen* to the User field. No additional scans are available on this screen.
- *Scan Orders By Customer screen:* When you first advance to the screen, the system defaults the value you entered in the [Sold to customer](#) field on the *Order Inquiry Scan Screen* to the Sold To field. You can scan by order date, order number, order status, and order type.
- *Scan By Salesrep screen:* When you first advance to the screen, the system defaults the value you entered in the [Sales rep # \(Sales representative number\)](#) field on the *Order Inquiry Scan Screen* to the Salesrep field. You can scan by salesrep, customer number and order number.
- *Scan By Batch # screen:* When you first advance to the screen, the system defaults the value you entered in the [Batch #](#) field on the *Order Inquiry Scan Screen* to the Batch# field. You can scan by order batch number, order number, and order status.
- *Scan By Purchase Orders screen:* When you first advance to the screen, the system defaults the value you entered in the [Purchase order #](#) field on the *Order Inquiry Scan Screen* to the Purchase Order # field. You can scan by purchase order number, order number and order ship to number, customer number, order status, and order date.
- *Orders By Order Status screen:* When you first advance to the screen, the system defaults the value you entered in the [Order status](#) field on the *Order Inquiry Scan Screen* to the Order Status field. You can scan by order number, order date, and customer number.
- *Scan By Order Date screen:* When you first advance to the screen, the system defaults the values you entered in the [Order date](#) and [Order status](#) fields on the *Order Inquiry Scan Screen* to the Order Date and Order Status fields. You can scan by order date, order number, and order status.
- *Scan By Order Items screen:* When you first advance to the screen, the system defaults the value you entered in the [Item/SKU](#) field on the *Order Inquiry Scan Screen* to the Item field. You can scan by SKU code, order number and ship to number, customer number, order status, price, quantity ordered, quantity shipped, and warehouse.
- *Scan By Order Items and Date screen:* When you first advance to the screen, the system defaults the values you entered in the [Order date](#), [Order status](#) and [Item/SKU](#) fields on the *Order Inquiry Scan Screen* to the Item, Date and Order Status fields. You can scan by order date, SKU code, order number and ship to number, customer number, order status, price, quantity ordered, quantity shipped, and warehouse.
- *Scan By Order Cross Reference # screen:* When you first advance to the screen, the system defaults the value you entered in the [Order cross ref #](#) field on the *Order Inquiry Scan Screen* to the Order Cross Ref # field. You can scan by order cross reference number.
- *Orders By Membership ID screen:* When you first advance to the screen, the system defaults the value you entered in the [Membership ID](#) field on the *Order Inquiry Scan Screen* to the Membership ID field. You can scan by order date, order number, order status, and customer number.
- *Scan By Tracking # screen:* When you first advance to the screen, the system defaults the value you entered in the [Tracking#](#) field on the *Order Inquiry Scan Screen* to the Tracking # field. You can scan by tracking number.

About activity indicators: The Activity fields on some order scan screens indicate whether any item on the order has been returned or exchanged, and whether the order includes any backordered items. The return indicator (RT) is in column 1, the exchange indicator (EX) is in

column 2, and the backorder indicator (*BO*) is in column 3. The date of the most recent return or exchange is in the R/E Date (Return/exchange date) field.

If an order has both a return and an exchange, the return date is indicated.

How to display this screen: At the *Order Inquiry Scan Screen*, enter available information about a quote or order in the appropriate field; see [Scan Screens by Order](#) for a list of fields that advance you to an Order Scan screen. You can also reach this screen by *selecting* a customer on a customer scan screen.

Screen Option	Procedure
Select an order	Select any record to advance to Order Inquiry for the quote or order you selected.

 Note:

If the order you select has additional recipient orders, you may need to select one of the shipping addresses before advancing to Order Inquiry.

Toggle between FIFO and LIFO view

Select *View by FIFO* to change the sequence of records to oldest to newest (FIFO).

Select *View by LIFO* to change the sequence of records to newest to oldest (LIFO).

 Note:

This option is not available on the following order scan screens:

- Scan Orders By Pick Control # screen
- Scan By CC Last 4 screen
- Scan By Card screen
- Scan by User screen
- Scan By Salesrep screen
- Scan By Batch # screen
- Scan By Purchase Orders screen
- Orders By Order Status screen
- Scan By Order Date screen
- Scan By Order Cross Reference # screen
- Orders By Membership ID screen
- Scan By Tracking # screen

Display Customer Sold To Screen (Reviewing Summary Information)

Purpose: Customer summary screens display address information for the customer who placed the quote or order (Sold To) who received the quote or order (Ship To) or who is billed

for the quote or order (Bill To). You may want to review this address prior to advancing to Order Inquiry to be sure this is the correct customer.

How to display this screen: Select *Display* for a customer on a customer scan screen. See [Customer Sold To Scan Screens](#).

Selecting Orders for Return (WRTA)

Purpose: You can select orders through the Return Authorization scan screen to create return authorizations, receive returns, or process credits.

The selection process works the same way regardless of whether you use the standard or streamlined process for return authorizations.

Navigation: You can navigate directly to the [Order Summary](#) page in Modern View from Classic View for each order inquiry link. Requires *Net Credit Card Credits for Deferred and Installment Billing (F55)* system control value to be selected. Once in Modern View, if you originally came from one of the links in Classic View, you can navigate back to the original screen and company in Classic View where you will need to exit the screen manually.

1. Search for order.
2. Select order.
3. Select Order Inquiry from Work with Returns for Order.

Select Switch to Classic View to return to Classic View.

Retail pickup or delivery orders: Unless the [Suppress Returns for Retail Pickup/Delivery \(L88\)](#) system control value is selected, you can process a return against a retail pickup or delivery order; however, shipping the order deactivates the [Order Broker Payment Type \(K98\)](#) applied to these orders, so you would first need to enter a new payment method in order to process the related refund.



Note:

You cannot process an exchange against a retail pickup or delivery order.

The system does not send a status update to Order Orchestration when you process a return against a retail pickup or delivery order.

See [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for an overview.

Ship-for-pickup orders: You can process a return for a ship-for-pickup order as long as the [Payment at POS for Ship for Pickup Orders \(L60\)](#) system control value is not selected. See [Ship-for-Pickup Orders](#) for an overview.

Store pickup orders: You cannot process a return against a store pickup order. See [Store Pickup Orders](#) for an overview.

Pick slip preparation: When you select an order for return authorization, the system removes any pick slip preparation from the order. When you accept or reject the return authorization, the system determines if the order qualifies for pick slip preparation and reapplies it to the order. If you add an exchange item to the order, the system performs pick slip preparation for the exchange item when you receive the return authorization. See [Preparing Orders for Pick Slip Generation](#).

In this topic:

- [Select Orders For Return Authorization Screen](#)
- [Scanning Process](#)
- [Edit Customer Actions](#)

Select Orders For Return Authorization Screen

Purpose: Use this screen to advance to subsequent return authorization screens.

Customer Workflow Management window: The [Customer Workflow Management Window](#) automatically displays when you select an order for return if open or in use ticklers exist for the customer. Select *Ticklers* at this window to advance to the [Work with Ticklers Screen \(sold to customer view\)](#) where you can review and work with ticklers associated with the sold to customer.

How to display this screen: Enter *WRTA* in the Fast Path field on any menu screen or select Work with Return Authorizations from a menu.

Field	Description
Order #	A unique number to identify an order and the shipping address. Enter the order number to advance to a screen where you can work with return authorizations for the order. (If the order has more than one shipping address, you advance first to the Work with Order Recipients Screen to select a recipient.) Order number Numeric, 8 positions; optional. Ship-to number Numeric, 3 positions; optional.
Sold-to customer	A unique number to identify the customer who places an order. Enter a customer number to advance to the Scan Orders by Customer Screen. Ghost customers: If you enter the customer number of a ghost customer, the scan screen does not display any orders; this is because a merge/purge has assigned any orders using that customer number to the “target” customer. You can identify a ghost customer by the setting of the Ghost flag. Numeric, 9 positions; optional.
Recipient customer	A unique number to identify the customer who receives the order (sold-to customer) and the permanent shipping address for the customer (ship-to customer). Enter a sold-to customer number and a ship-to number for this customer to advance to the Scan Orders by Customer Ship To screen, which lists orders for each sold-to/ship-to combination. Sold-to number: numeric, 9 positions; optional. Ship-to number: numeric, 3 positions; optional.
Item	A code identifying a unit of inventory. Enter a full or partial item code and SKU, if any, to advance to the Scan Orders by Item screen. Alphanumeric, 12 positions; optional.
SKU (Stock keeping unit)	The unique characteristics of an item, such as its color and size. Alphanumeric, three 4-position fields; optional.

Field	Description
Order status	Indicates the state of an order. Valid values are: • blank = Open • <i>Cancelled</i> • <i>Error</i> • <i>Held</i> • <i>Purged</i> • <i>Quote</i> • <i>Suspended</i> • <i>Closed</i> Select an order status to advance to the Orders by Order Status scan screen. Optional.
Order date	The date that you took the order. Enter a date to advance to the Scan Orders by Date screen. Numeric, 6 positions (in user date format); optional.
Purchase order #	The customer's internal purchase order number. Enter a full or partial purchase order number to advance to the Scan Orders by Purchase Order Number screen. Alphanumeric, 15 positions; optional.
Tracking #	The number assigned by the shipper to track the shipment. This number is stored in the Manifest Upload Audit table if you use PC manifesting, <i>Generic Pick In API (Shipments, Voids, and Backorders)</i>, or Manually Confirming Shipments (MCON) to ship an order. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Enter a full or partial tracking number to advance to the Scan by Tracking # screen. If your entry is an exact match to a tracking number for an order, you advance directly to the order. Alphanumeric, 30 positions; optional.
Order cross ref #	The order number, if any, that was passed through the <i>Generic Order Interface (Order API)</i> and used to identify the order in an external system. In the case of a retail pickup or delivery order assigned through the Order Orchestration Integration, this is the order number in the system originating the order. If the originating system is Order Administration, the system prefaces the originating order number with the text ORIG#: . For example: ORIG#: 9999-001, where ORIG#: indicates the order originated in Order Administration, 9999 is the original order number in Order Administration, and 001 is the ship to number. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). This is the Alt ord displayed at the Display Order Properties Screen. Enter a full or partial order cross reference number to advance to the Scan by Order Cross Reference # screen. If you wish to review all retail pickup and delivery orders whose originating system is Order Administration, enter ORIG#: in the Order cross ref # field and select <i>OK</i> to advance to the Scan by Order Cross Reference # screen where all orders whose E-Commerce order number in the Order Header Extended table begin with ORIG#: display. Alphanumeric, 35 positions; optional.

Field	Description
Customer scan options	
Match code	A code the system assigns to each customer to provide a unique standard or fraud identifier. Enter a full or partial match code to advance to the Scan Sold To Customer by Match Code screen. Alphanumeric, 15 positions; optional.
Postal code	The customer's postal or zip code. Enter a full or partial code to advance to the Scan Sold To by Postal Code/ Company screen. This screen lists all customers by postal code in ascending (lowest to highest) numeric sequence, beginning with the code you entered. <i>Scan length:</i> The Postal Code Scan Length (F61) system control value controls how many characters of the postal code to use when searching for a customer. See that system control value for a discussion. If you enter a postal code, last name, and first name, you advance to the Scan Customer Sold To by Postal Code screen, which lists all customers alphabetically beginning with the postal code you entered. Alphanumeric, 10 positions; optional.
Last name	The customer's last name. Enter a full or partial name to advance to a Scan Cust Sold To By Last Name screen, which lists all customers alphabetically beginning with the name you entered. You can also include a full or partial first name along with a full (not partial) last name to restrict the scan further. Alphanumeric, 25 positions; optional.
First name	The first name of the customer who placed the order. Enter the last name, first name, and postal code to advance to the Scan Customer Sold To by Postal Code screen, which lists all customers alphabetically beginning with the postal code you entered. You can also enter just the full (not partial) last name and full or partial first name to advance to the Scan Cust Sold To By Last Name screen.
 Note: First name must be used in conjunction with Postal code, Last name or with just Last name for scanning. You cannot scan on first name alone.	
Company name	Alphanumeric, 15 positions; optional. The name of the company placing the order. Enter a full or partial company name to advance to the Scan Cust Sold To By Company Name screen. Alphanumeric, 30 positions; optional.
Phone number	The customer's daytime, evening, or third (fax or mobile) telephone number. Alphanumeric, 14 positions; optional.

Field	Description
E-mail address	An email address for the customer. When you enter a full or partial email address, you advance to the Scan Customer by E-mail Address screen, where you can scan by any email address on table for a sold-to customer. This field is not case sensitive; an email address of <i>abc@example.com</i> matches an entry of <i>ABC@EXAMPLE.COM</i>, and vice versa. Alphanumeric, 30 positions; optional.
Other scan options	
Sales rep # (Sales representative number)	A code that identifies a sales representative from your company. Enter a sales representative number to advance to the Scan Orders by Salesrep screen. Numeric, 7 positions; optional.
Batch #	A number that identifies a group of orders entered as a batch. Enter a valid batch number to advance to the Scan Orders by Batch # screen. Numeric, 5 positions; optional.
Invoice #	A unique number the system assigns to an invoice for each shipment on an order. Enter an invoice number to advance to the a return authorization screen. See Working with Return Authorizations: Standard Process or Working with Return Authorizations: Streamlined Process. Numeric, 7 positions; optional.
Country	The code representing the customer's country. Country codes are defined in and validated against the Country table. See Setting Up the Country Table (WCTY). Enter a full or partial country code to advance to the Scan Customer Sold To By Country screen. Alphanumeric, 3 positions; optional.

Scanning Process

Type of Scan	Fields	Result
unique information on the order	order number invoice number tracking number (if exact match)	Advance directly to a screen where you can create return authorizations or work with existing return authorizations for the order. See Working with Return Authorizations: Standard Process or Working with Return Authorizations: Streamlined Process .

Type of Scan	Fields	Result
general information on the order	item/SKU order status order date credit card # PO # salesrep # batch # country tracking number (if not an exact match) order cross reference number	Advance to an order scan screen (select an order to advance to one of the return authorization screens).
information on the customer	sold to customer match code postal code last name first name company name phone number email address	Advance to a customer scan screen (select a customer to advance to an order scan screen).

How to Advance from a Customer Scan Screen

Select the customer. Selecting a customer record from this screen (or from any sold-to customer scan screen when you are using the Return Authorization function) advances you to an order scan screen, where you can select an order for return authorization.

Ghost customers: If you enter the customer number of a ghost customer, the scan screen does not display any orders; this is because a merge/purge has assigned any orders using that customer number to the “target” customer. You can identify a ghost customer by the setting of the [Ghost](#) flag.

How to Advance from an Order Scan Screen

How to advance from an order scan screen: From an order scan screen, select the order you want to work with.

Standard process:

If a return authorization already exists for the order you select, you advance to the [Work with Return Authorizations Screen](#). From this screen, you can create a new return authorization, or you can work with an existing authorization, adding new items or receiving and/or crediting the items already selected.

If no return authorization exists for the order you select, you advance to the [Work with Return Authorization Detail Screen](#). From this screen, you can create a new return authorization and process it as far as necessary.

Streamlined process:

You advance directly to the [Work with Returns for Order Screen](#), where any items available for returns processing display. To be available for returns processing, the item must be either shipped and unreturned, or have one or more return authorization currently in process.

Edit Customer Actions

The [Edit Customer Actions Window](#) opens when:

- the [Display Customer Action Notes/Messages in RA \(F64\)](#) system control value is *selected*, and,
- you select an order for return authorization and there are open action notes for the sold to customer.

The window opens in both standard and streamlined return authorizations.

Working with Customer Warranty Information (WCST)

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

Customer warranty information is a way to track which unit of a product the customer has purchased and the date the purchase took place. You can define warranty information, such as model number, serial number, and the date of purchase, for the products that a customer has purchased at no charge. This is helpful to track specific units of a product in case of a recall.

Where can I view customer warranty information? You can create or work with customer warranty information in order entry, maintenance, inquiry, quote entry, maintenance, inquiry and customer maintenance. The system automatically displays the [Work with Customer Warranty Information Screen](#) in order entry and maintenance and quote entry and maintenance if an operator enters a source code on the order header whose Warranty required field is *selected*.

How can I set up a warranty item? You can define an item or SKU as a warranty item by *selecting* the Warranty field on the item offer or SKU offer. When the item or SKU for the offer defined on an order detail line is set up as a warranty item, the system adds the item to the order at no charge.

Adding a warranty item to an order: When an operator adds a warranty item to an order in order entry or order maintenance:

- the system updates the Warranty field on the order detail line to *selected*.
- the system updates the No charge field on the order detail line to *selected*.
- if a [Default Price Override Reason for Warranty Items \(G01\)](#) is specified, the system defaults the price override reason code to the Price override code field on the order detail line. If this system control value is unselected, the operator must manually enter a price override code. If a price override code already exists for the order detail line, the system uses this reason.
- if you want to track the reason why the warranty item was added to the order, you can require the operator to enter an add reason code for the item, by *selecting* the Require reason field on the item offer or SKU offer. When this field is *selected*, the system displays the Enter Add Reason pop-up window where the operator is required to enter the reason why the item was added to the order. See [Entering Orders](#).
- if an operator enters a price for the warranty item, the system displays an error message similar to the following: Warranty item - price not allowed.

**Note:**

Because a quote may not be converted to a standard order, it is not recommended that you add a warranty item to a quote.

Warranty holds: The system tracks the amount of warranty items a customer is ordering and automatically places orders on hold if the warranty dollar amount exceeds one or two thresholds. You can define a maximum warranty order amount or a maximum life to date warranty amount for a customer using the following system control values.

System Control Value	Description
<i>Maximum Warranty Order Amount (F97)</i>	Defines the maximum dollar amount allowed for warranty items on an order in order entry and order maintenance before the order is placed on warranty order hold (WO). <i>Example:</i> Maximum warranty order amount = 30.00 Warranty item 1 = 20.00 Warranty item 2 = 15.00 If an operator entered warranty item 1 and warranty item 2 to an order, the total cost for the warranty items would equal 35.00 (20.00 + 15.00 = 35.00). Since 35.00 dollars exceeds the maximum warranty order amount, the system would place this order on warranty order hold.
<i>Maximum LTD Warranty Amount for Customer (F98)</i>	Defines the maximum life to date warranty dollar amount allowed for a customer before orders for this customer containing warranty items are placed on warranty customer hold (WC). <i>Example:</i> Maximum life to date warranty for a customer = 100.00 Current life to date warranty dollar amount = 60.00 Dollar amount for warranty items on the order = 50.00 If the current life to date warranty amount for this customer is 60.00 and an operator entered an order for this customer that contained warranty items whose dollar amount equaled 50.00, the system would place the order on warranty customer hold since the life to date warranty amount now equaled 110.00 (60.00 + 50.00 = 110.00).

Costing: Since warranty items are added to an order at no charge, the system uses the cost defined for the item to determine the dollar amount of a warranty item on an order. If the cost was overridden on the order detail line, the system uses the cost override.

Credit checking: The system places an order on hold during the credit checking process. You can bypass warranty credit checking by *selecting* the Bypass credit check field in the Source Code table. When this field is *selected*, the system does not perform credit checking or warranty checking against any orders entered with this source code defined on the order header. The system writes a message similar to the following to Order Transaction History: CREDIT CHECKING WAS BYPASSED.

Billing updates: When a warranty item is shipped or returned, the system updates:

- the Warranty dollars shipped field in the Customer Sold To Order History table with the dollar amount of the warranty items on the order. The system uses the cost defined for the item to determine the dollar amount of a warranty item on an order since a warranty item is added to an order at no charge. If the cost was overridden on the order detail line, the system uses the cost override.
- the Warranty dollars returned field in the Customer Sold To Order History table with the dollar amount of the warranty items that have been returned or exchanged on an order. The system uses the cost defined for the item to determine the dollar amount of a warranty item since a warranty item is added to an order at no charge.
- the Life to date warranty dollars amount field using the following calculation: warranty dollars shipped - warranty dollars returned = life to date warranty dollars amount. The life to date warranty dollars amount field is calculated by the system when an order is processed through the Billing Async and is used to determine if an order is put on warranty customer hold. This field displays on the [Work with Customer Warranty Information Screen](#).

For more information:

- reviewing customer sold to order history: [Display Customer Order History Screen](#)
- warranty holds the system can place on an order: [Introducing Order Hold Reason Codes](#)

In this topic:

- [Work with Customer Warranty Information Screen](#)
- [Create Customer Warranty Information Screen](#)

Work with Customer Warranty Information Screen

How to display this screen: Select *Customer Warranty Info* for a customer at a scan screen in customer maintenance. See [Selecting Customers](#).

You advance automatically to this screen in order entry or order maintenance if you enter a source code on the order header that is set up to require warranty information (the Warranty required field for the source code is *selected*) and there is already warranty information for this customer.

You can also advance to this screen in order entry, order maintenance, and standard order inquiry from the [Display More Options Screen](#).

Field	Description
LTD warranty \$ (Life to date warranty dollar amount)	A system calculated field that is updated when an order is processed through the Billing Async that indicates the life to date warranty dollar amount for this sold to customer. The system uses the life to date warranty dollar amount to determine if an order should be put on warranty customer hold. The system uses the following calculation to determine the life to date warranty dollar amount: warranty dollars shipped - warranty dollars returned = life to date warranty dollar amount Numeric, 13 positions with a 4-place decimal; display-only.
Customer	The number and last name, first name, and middle initial of the sold to customer for whom you are creating customer warranty information. Customer number: Numeric, 9 positions; display-only. Customer sold to name: Alphanumeric, 41 positions; display-only.

Field	Description
Model #	A number used to represent a product. The model number is informational only. Alphanumeric, 20 positions; optional.
Type	A code used to define the type of product. The product type is informational only. Alphanumeric, 3 positions; optional.
Serial number	A number used to define a specific unit of your product. The serial number is informational only. Numeric, 15 positions; optional.
Date of purchase	The date the product was purchased. Numeric, 6 positions (in user date format); display-only.

Screen Option	Procedure
Change a customer warranty	Select <i>Change</i> for a customer warranty to advance to the Change Customer Warranty Information Screen. You can change anything on this screen except the Customer number, Customer name and the Life to date warranty dollars fields. See Create Customer Warranty Information Screen for field descriptions.
Delete a customer warranty	Select <i>Delete</i> for a customer warranty to delete it.
Display a customer warranty	Select <i>Display</i> for a customer warranty to advance to the Display Customer Warranty Information Screen. You cannot change any information on this screen. See Create Customer Warranty Information Screen for field descriptions.
Create a customer warranty	Select <i>Create</i> to advance to the Create Customer Warranty Information Screen .

Create Customer Warranty Information Screen

Purpose: Use this screen to create a customer warranty.

How to display this screen: Select *Create* at the [Work with Customer Warranty Information Screen](#). You also advance to this screen in order entry and order maintenance if you enter a source code whose Warranty required field is *selected* and warranty information does not exist for the sold to customer.

Field	Description
Customer	The number and sold to last name, first name, and middle initial of the customer for whom you are creating warranty information. Customer number: Numeric, 9 positions; display-only. Customer sold to name: Alphanumeric, 41 positions; display-only.
Model #	A number used to represent a product. The model number is informational only. Alphanumeric, 20 positions; required.

Field	Description
LTD warranty \$ (Life to date warranty dollar amount)	A system calculated field that is updated when an order is processed through the Billing Async that indicates the life to date warranty dollar amount for this sold to customer. The system uses the life to date warranty dollar amount to determine if an order should be put on warranty customer hold. The system uses the following calculation to determine the life to date warranty dollar amount: warranty dollars shipped - warranty dollars returned = life to date warranty dollar amount Numeric, 13 positions with a 4-place decimal; display-only.
Type	A code used to define the type of product. The type code is informational only. Alphanumeric, 3 positions; optional.
Serial number	A number used to define a specific unit of your product. The serial number is informational only. Numeric, 15 positions; optional.
Date of purchase	the date the product was purchased. An error message indicates if you enter a date that is later than today's date: Date entered must not be greater than today's date. Numeric, 6 positions (in user date format); optional.

Fulfillment

- [Reserving Inventory and Generating Pick Slips](#)
- [Confirming and Billing Shipments](#)
- [Setting Up the Fulfillment Tables](#)
- [Shipping Zone Reservation](#)
- [Order Orchestration Drop Ship Integration](#)

Reserving Inventory and Generating Pick Slips

Topics in this part:

- [Reviewing Reservation Types](#) describes the three types of reservations: Immediate, Batch, and Interactive.
- [Reviewing Other Reservation Conditions](#) discusses other reservation conditions, such as: Coordinate grouping, drop ship reservations, special handling reservations, and reserving inventory for sets and variable sets.
- [Working with Interactive Reservation \(MIRV\)](#) discusses creating, changing, deleting, and displaying order information using this reservation type.
- [Preparing Orders for Pick Slip Generation](#) provides an overview on preparing an order for pick slip generation.
- [Performing Pick Slip Generation](#) includes locating the pick slip generation function, printing pick slips, performing cubing, selecting pick locations, replenishing stock, and using cart/bin picking.
- [Selecting Vendors for Drop Ship Processing \(MDSP\)](#) includes creating, changing, deleting, and displaying vendors for drop ship processing.
- [Displaying Pick Slip Generation Inquiry \(DPSI\)](#) describes this management tool.
- [Working with Pick Slip Messages \(WPSM\)](#) describes creating, changing, deleting, and displaying pick slip messages.
- [Processing Drop Ship Orders by Batch \(MDSB\)](#) describes how to generate drop ship picks by batch for selected vendors.
- [Printing the Carryover Report \(PCOR\)](#) describes how to generate the Carryover reports.
- [Generic Pick Out API](#) describes how to generate the outbound pick slip message for integration with another system.
For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).
- [Streamlined Pick Slip Generation \(WSPS\)](#) describes a streamlined version of the pick slip generation option.
- [Pick Print Eligibility \(WPPE\)](#) determines whether the system will include picks for a specified order in the next pick slip generation run for the selected pick slip generation template.
- [Unlock Pick Slip \(MUPI\)](#) allows you to unlock a pick slip.

Reviewing Reservation Types

Purpose: The Reservation module reserves inventory from a specific warehouse or multiple warehouses for customer orders as they are entered and accepted through Order Entry.

The system continually evaluates new orders and backorders to ensure that stock is being reserved appropriately for all orders. There are two reservation types:

- **Immediate** = The system reserves stock when an order is placed, providing stock is available. In an immediate or real-time environment, the system reserves inventory on a first-come, first-served basis (FIFO) in the specified warehouse as each item is added to an order.
- **Interactive** = The system reserves stock through an interactive entry program. When using the Interactive Reservation function, no inventory is reserved until you use [Working with Interactive Reservation \(MIRV\)](#). This program allows you to disburse inventory manually to preferred customers or to customers who order in large wholesale volume.



Note:

In order for the system to reserve inventory for a particular item in a warehouse, the [Reservation freeze](#) field for that item warehouse must be unselected.

In this topic:

- [Reserve Warehouse Hierarchy](#)
- [Reviewing Immediate Reservation](#)
 - [Reserving Backorders](#)
- [Reserving Stock with Immediate Reservation](#)
- [Reviewing Interactive Reservation](#)
- [Reserving Stock with Interactive Reservation](#)

Reserve Warehouse Hierarchy

The system assigns a warehouse to an order or order line using the following hierarchy:

- **A warehouse code for an individual order line:** If you enter a warehouse code for an individual order line using the Add Line option, the system will use this warehouse to reserve the order line. This warehouse assignment will override all other reserve warehouse logic.
- **A warehouse code entered on the order header:** If you enter a warehouse code in the *Warehouse* field on the Work with Order screen, the system will use this warehouse to reserve all lines on the order. This warehouse assignment will override all other warehouse assignments except a warehouse code entered for an individual order line.
- **Warehouse list:** If you have not entered a warehouse code for an individual order line, or a warehouse code on the order header, the system will look for a warehouse list for the SCF of the order ship to address, if system control value [Ship Complete from 1 Warehouse \(B16\)](#) selected.
- **The item's primary warehouse:** If no reserve warehouse can be assigned based on individual order lines, a warehouse code entered on the order header, or a warehouse list,

the system will reserve the item in the warehouse defined for the item in the Item table.
See [Warehouse Lists and Single Order Lines](#).

Reviewing Immediate Reservation

Overview: In the Immediate Reservation environment, the system reserves inventory for an item when the order is placed. In addition, stock is reserved for eligible backorders as new merchandise is received into active inventory in the warehouse. This ensures that eligible backorders receive stock prior to new orders. Backorders are reviewed on a continual basis to ensure that eligible backorders receive stock prior to new orders and that orders are ready for printing as soon as possible.

The system prepares an order for pick slip generation when an order is created or changed; see [Preparing Orders for Pick Slip Generation](#).

You must run [Streamlined Pick Slip Generation \(WSPS\)](#) to generate and print pick slips. See [Performing Pick Slip Generation](#).

System control values which control Immediate Reservation:

System Control Value	Results
Immediate Reservation (A64) Selected/Unselected	- Selected = Inventory is reserved for open orders as each line is entered in Order Entry. - Unselected = Inventory is reserved for orders through Working with Interactive Reservation (MIRV).
FIFO Flag (A03) Selected/Unselected	- Selected = Inventory will be held for orders on a first-in/first-out basis, regardless of whether the order is eligible for fulfillment. Must be selected if Immediate Reservation (A64) is selected. - Unselected = Inventory will not be held for orders that are not eligible for fulfillment. NOTE: If this field is unselected, the system subtracts the SKU open quantity from the On hand quantity for each warehouse in calculating the Available quantity. For example, if you have 10 units of an item on-hand in warehouse 1 and warehouse 2, and you enter an order for a quantity of 2, the system displays an available quantity of 8 in both warehouse 1 and warehouse 2.
Default Warehouse (A04)	Enter a valid Warehouse code that represents the primary shipping warehouse. This code will display on many screens throughout the system. NOTE If you are in a multiple warehouse environment, you may want to leave this field blank.
Ship Complete from 1 Warehouse (B16) Selected/Unselected	- Selected = The system will attempt to consolidate reserve warehouses for the order, using warehouse list logic. - Unselected = The system will attempt to reserve inventory from the item's primary warehouse as defined in the item table. See Working with Warehouse Lists (WWHL) for an explanation of the system's reserve warehouse logic.
Split Line Over Multi Whse (B19) Selected/Unselected	- Selected = A line on an order can be fulfilled by inventory from more than one warehouse. - Unselected = An order line must be fulfilled by inventory from only one warehouse. NOTE: When This system control value is not currently implemented.

System Control Value	Results
Reservation Lead Days (B27)	Enter the number of days after which an order (or order line) should be considered a future order and will not be reserved.

Reserving Stock with Immediate Reservation

Determining stock availability: In the Immediate Reservation environment, the system reserves inventory on a first-come, first-served (FIFO) basis in the specified warehouse, as you add an item to an order.

The system is always attempting to reserve stock, based on your System Control table values and by using the Quantity Available calculation to determine if there is sufficient stock for new orders.

Quantity Available Calculation

On hand - Protected - Reserved - Reserve transfer - Backordered = Quantity Available

Definitions:

On hand: the quantity of the item currently in the warehouse

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

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

Reserve transfer: the quantity of the item set to be transferred to another warehouse

Backorder: the quantity of the item unavailable for existing orders that must be fulfilled through PO Receipts



Note:

Each time an item is reserved, the system reduces the *Quantity available* and updates the *Quantity open* by the *Quantity ordered* fields in the Item/Warehouse table. Availability is reduced, regardless of the reservation type.

Reserving stock: In the Immediate Reservation environment, the system reserves stock, as follows:

- If the total order is available: The system increments the order detail line with the quantity reserved to fulfill the order. The program increments the *Quantity open* and *Quantity reserved* fields in the Item/Warehouse table.
- If a partial order is available: The system reserves what it can and backorders the rest. See [Reserving Backorders](#).
- If no part of the order is available: See [Reserving Backorders](#).



Note:

In a FIFO environment, an eligible order is any order taken for an item, open or held.
In a Non-FIFO environment, only open orders are considered eligible for reservation.

Reserving Backorders

Orders for which stock is unavailable at the time of order entry will not be eligible for immediate reservation. These orders will have stock reserved using the Evaluate Backorders Program. This is a batch program that can be initiated automatically by PO Receiving or Inventory Transactions. The system processes backorders as follows:

- When no part of the order is available: The system does not reserve the item in any warehouse and increments the *Quantity backordered* field in the Item/Warehouse table.
- When a partial order is available: The system reserves what it can and backorders the rest, and increments the *Quantity reserved* and the *Quantity backordered* fields in the Item/Warehouse table.



Note:

Any item/SKU which has been assigned a zone reservation code will be excluded from backorder reservation in the Evaluate Backorders Program. These items are normally reserved and shipped through the zone reservation process; however, zone reservation coded items which have been backordered through the standard order entry process can be reserved in Work with Interactive Reservation. See [Shipping Zone Reservation Overview](#), for information on zone reservation. See [Working with Interactive Reservation \(MIRV\)](#), for more information on reserving interactively.

Evaluating future orders: The arrival date is the date on which the customer wants to receive the order; this date controls whether the system reserves inventory immediately and whether to create pre-generated picks. The system uses the following calculation to determine future orders.

Future Orders Calculation:

If Arrival date - Reservation lead days is equal to or greater than today's date, the order is a Future order.

The Evaluate Future Orders program runs each evening to evaluate all order detail lines marked as "future order." The system re-runs the arrival date calculation and reserves the required inventory based on the order date, if the system-calculated date is less than or equal to today's date.

When the system determines that an order is a future order:

- Inventory is not reserved.
- Each detail line is marked as a future order.

Reviewing Interactive Reservation

Overview: This feature allows you to reserve stock for specific customers or orders via [Working with Interactive Reservation \(MIRV\)](#). No inventory is reserved until you run the Interactive Reservation Program to manually disperse inventory to preferred customers, or to customers who purchase large volumes of inventory.

You can designate specific customers for interactive reservation using a Customer Class code in which the [Bypass reservation](#) field is flagged, or by selecting the flag for individual customers; for these customers, orders is not reserved in order entry. You can designate specific items to bypass reservation in order entry by using a quantity limit in the Item/SKU table (i.e., items for which there is limited stock).

**Note:**

Use the *Bypass reservation* flag only if the [Use OROB for Fulfillment Assignment \(M31\)](#) system control value is unselected. This system control value uses the *Bypass reservation* flag to send orders to Order Orchestration for fulfillment assignment.

System control values that control Interactive Reservations:

System Control Value	Results
Immediate Reservation (A64) Selected/Unselected	- Selected = Inventory is reserved for open orders as each line is entered in Order Entry. - Unselected = Inventory is reserved for orders through Interactive Reservation. NOTE: A Bypass reservation flag in the Customer table indicates that you do not want to reserve stock for that customer via Immediate Reservation.
FIFO Flag (A03) Selected/Unselected	- Selected = Inventory will be held for orders on a first-in/first-out basis, regardless of whether the order is eligible for fulfillment. Must be selected if Immediate Reservation (A64) is selected. - Unselected = Inventory will not be held for orders that are not eligible for fulfillment.
Default Warehouse (A04)	Enter a valid Warehouse code that represents the default warehouse. This code will display on many screens throughout the system. NOTE: If you have multiple warehouses, you may want to leave this field blank.
Ship Complete from 1 Warehouse (B16) Selected/Unselected	- Selected = The system will attempt to consolidate reserve warehouses for the order, using warehouse list logic. - Unselected = The system will attempt to reserve inventory from the item's primary warehouse as defined in the item table. See Working with Warehouse Lists (WWHL) for an explanation of the system's reserve warehouse logic.
Split Line Over Multi Whse (B19) Selected/Unselected	- Selected = A line on an order can be fulfilled by inventory from more than one warehouse. - Unselected = An order line must be fulfilled by inventory from only one warehouse. NOTE: This system control value is not currently implemented.
Reservation Lead Days (B27)	Enter the number of days after which an order (or order line) should be considered a future order and will not be reserved.

Reserving Stock with Interactive Reservation

Reservation conditions: In [Working with Interactive Reservation \(MIRV\)](#), the system reserves stock only if:

- The order is not a future order; the system-calculated date is less than or equal to today's date.
- The [Reservation freeze](#) field in the item/SKU warehouse record is not selected.
- Reservations can be performed against the warehouse in the Item/Warehouse record.

**Note:**

Each time an item is reserved, the system reduces the *Quantity available* and updates the *Quantity reserved*. Availability is reduced, regardless of the reservation type.

Reserving stock: In the Immediate Reservation environment, the system reserves stock based on the values defined in the *Quantity reserve limit* field in the Item table. This quantity represents the maximum quantity that can be reserved for any one order through Immediate Reservation in order entry. If the quantity ordered by a customer exceeds this quantity, the system will not reserve any inventory for that order detail line. This order detail line must be flagged for reservation by the Interactive Reservation Program.

Displaying held orders: In Interactive Reservation, you can display held orders that have inventory reserved for them.

The list of held orders is displayed by hold code (e.g., all fraud orders are displayed first) and within hold code by date. You can release the inventory reservation on these orders; however, to cancel the order or take any other action, you must use the Order Maintenance function.

Reviewing Other Reservation Conditions

Purpose: The Reservation function reserves stock for customer orders; however, some orders may include items that require special handling, drop ships, or coordinate groups. Additionally, some orders have items that belong to sets or variable sets. These special conditions may cause the system to process reservations and generate picks differently than it would for regular items.

In this topic:

- [Reserving Coordinate Group Items](#)
- [Reserving Drop Ship Items](#)
- [Reserving Special Handling Items](#)
- [Reserving Inventory for Finished Good Orders](#)
- [Reserving Inventory for Set Orders](#)
- [Reserving Inventory for Variable Set Orders](#)

Reserving Coordinate Group Items

Overview: Coordinate grouping ensures that items on an order ship together. Items with the same coordinate group number will not allocate unless inventory is available for all of the items. Items are coordinate grouped in Order Entry and Order Maintenance.

If the Reservation program cannot reserve stock for all items linked by a common coordinate group, it will reserve stock for the available items and leave the other items on backorder. The remaining items will be reserved in the same manner as all other backorders.

Creating pre-generated picks: The system creates a pre-generated pick only if all lines that are coordinate grouped are eligible for pick slip preparation. The system may split the lines that are coordinate grouped across multiple picks. See [Preparing Orders for Pick Slip Generation](#) and [Splitting an Order Across Multiple Picks](#).

Printing pick slips: No special information pertaining to coordinate grouping appears on the pick slip. See [Performing Pick Slip Generation](#).

! Important:

The same ship via must be assigned to items that belong to the same coordinate group.

Reserving Drop Ship Items

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

Reserving stock: To use the Drop Ship Reservation feature, you must indicate in the Vendor table whether you want to send drop ship picks, POs, and/or EDI transmissions, or process drop ship orders for this vendor using the [Order Orchestration Drop Ship Integration](#). You can also ship items that are typically drop ship items from your own warehouse. For example, you may have returns that can be used to fulfill new orders; these items could be shipped from your warehouse rather than the vendor's warehouse.

When you take an order for a drop ship item, the system attempts to reserve stock from your warehouse, rather than from the vendor, as follows:

- If the entire quantity is available in the warehouse, it is reserved.
- If the entire quantity is not available in the warehouse, the system requires the order be sent from the vendor.

Printing drop ship pick slips: Drop ship items produce drop ship pick slips or drop ship purchase orders. If a drop ship item cannot be allocated from inventory, which is usually the case, the system produces a drop ship pick slip or purchase order.

The system performs the following procedures during drop ship processing:

1. An item is flagged as “Drop Ship” in the Item table.
2. When you add the item to an order, it displays on neither reserved nor backordered. The “Drop Ship” flag appears on the order line detail.
3. When you generate pick slips or purchase orders, the system checks the Item/SKU table to determine the primary vendor assigned to the item/SKU ordered.
4. The system then checks the Vendor table to determine whether this vendor takes drop ship purchase orders, drop ship pick slips, or processes drop ship orders using the interface with Order Orchestration's Drop Ship Manager. If the vendor takes drop ship pick slips, the system prints a separate pick slip.

Reserving Special Handling Items

Overview: Items that can be personalized or finished are considered special handling (S/H) items. Personalization might include monogramming, engraving, hemming, etc.

Reserving S/H items: The system reserves inventory for these items in the same way as for any other item. A separate processing step is not required to reserve stock for these orders. Stock is reserved immediately or by the Evaluate All Backorders Program. See [Reviewing Reservation Types](#).

As inventory is reserved for these orders, the reservation program increments the *S/H Reserve* field in the Item/Warehouse table.

Pick slip preparation: The [Split Special Handling Picks \(L44\)](#) controls whether the system creates a separate pre-generated pick for the order lines on an order that contain a special

handling code. This system control value also controls whether the system creates a separate pick slip PDF document for picks that contain items that require special handling.

Printing pick slips: The [Special Handling](#) field on the [Streamlined Pick Slip Generation Screen](#) allows you to select pre-generated picks for pick slip generation based on the presence of a special handling code for an item. Special handling instructions entered during Order Entry will print on the pick slip if the pick slip printing program you are using permits it. This is true whether the line prints on an individual pick slip or is on a pick slip with other items.

Reserving Inventory for Finished Good Orders

Overview: Finished good orders are orders that require assembly prior to picking and packing. A finished good, defined as Finished Good in the [Kit type](#) field in the Item table, is comprised of one or more component items that you may also sell individually.

Reserving stock: Finished goods are reserved at the finished good level, not at the component level.

Orders where the inventory is not reserved immediately will have stock reserved using the Evaluate All Backorders Program. See [Reviewing Reservation Types](#).

Creating pre-generated picks: Typically, the system looks at the lead days for the shipper and your internal lead time to determine when to create a pre-generated pick.

Printing pick slips: The pick slip lists only the finished good; component information does not appear.

See [Entering Finished Goods Information \(WFGD\)](#) for more information on working with finished goods.

Reserving Inventory for Set Orders

Overview: A set item, identified by a Set in the [Kit type](#) field in the Item table, is composed of two or more items that you sell together as a unit. The items that make up a set are often referred to as components. You can also sell these components individually.

Reserving stock: Sets are reserved at the component level only. Orders where the inventory is not reserved immediately will have stock reserved using the Evaluate All Backorders Program. See [Reviewing Reservation Types](#).

Soldouts:

- **Component item(s):** If any of the component items on a set are sold out based on the assigned soldout control code and the current inventory situation, the main set item and each of the component items are added to the order in a soldout status (S). For example, if the set includes five items, and one of the items is assigned a soldout control code indicating to sell the item out immediately, the main set item and all of the component items will be added to the order in a soldout status.
- **Main set item:** Similarly, if the main set item itself is assigned *any* soldout control code, the main set item and each of the component items are added to the order in a soldout status (S).

See [Working with Soldout Controls \(WSLD\)](#) for a discussion on how soldout controls indicate when an item is sold out.

Pick slip preparation: To create a pre-generated pick for a set:

- If the set and component items are coordinate grouped, all of the component items must be reserved and in an open status.
- If the set and component items are not coordinate grouped, at least one of the component items must be reserved and in an open status.

See [Selecting Order Lines for Pick Slip Preparation](#).

Printing pick slips: The pick slip shows the components of the set, but not the price of each component. The price of the set displays on the pick slip next to the set item only.

For more information: See [Entering Set Information \(WSET\)](#) for more information on working with sets.

Reserving Inventory for Variable Set Orders

Overview: Variable sets, defined as Variable Set in the [Kit type](#) field in the Item table, are items that allow customers to choose from a list of component items to make up the set they want to purchase.

Reserving stock: Variable sets are reserved at the component level. Orders where inventory is not reserved immediately will have stock reserved using the Evaluate All Backorders Program. See [Reviewing Reservation Types](#).

Printing pick slips: The pick slip lists an order detail line for each component item and does not refer to the variable set at all. Prices are shown for each component.

See [Entering Variable Set Information \(WVST\)](#) for more information on working with variable sets.

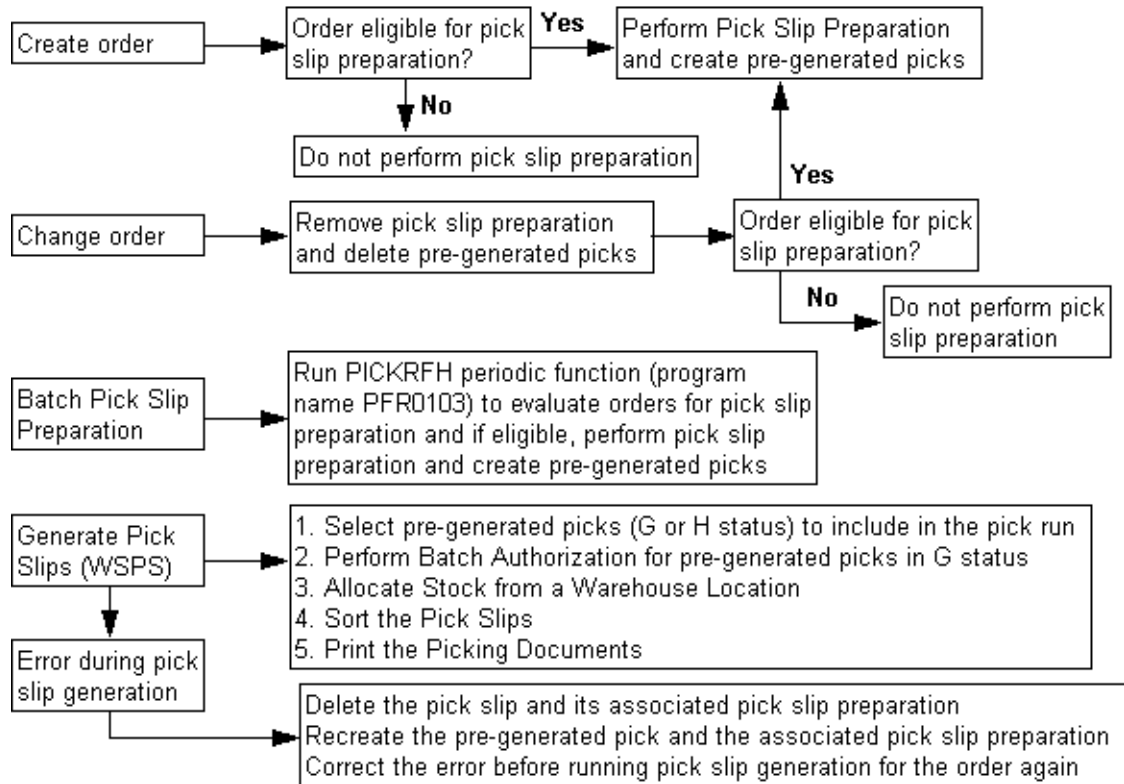
Preparing Orders for Pick Slip Generation

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

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

Pick slip preparation process:

Preparing Orders for Pick Slip Generation



Standard pick slip generation: You cannot use standard pick slip generation (WPSG) for orders that are eligible for pick slip preparation; you must use Streamlined Pick Slip Generation (WSPS) to complete the pick slip generation process.

In this topic:

- [Pick Slip Preparation Setup Requirements](#)
- [Selecting Order Lines for Pick Slip Preparation](#)
- [When is Pick Slip Preparation Performed?](#)
- [Batch Pick Slip Preparation](#)
- [Applying Pick Slip Preparation to an Order](#)
- [Splitting an Order Across Multiple Picks](#)
- [Creating Pre-Generated Picks](#)
- [Removing Pick Slip Preparation from an Order](#)

For more information: See:

- [Performing Pick Slip Generation](#) for an overview and processing details.
- [Streamlined Pick Slip Generation \(WSPS\)](#) to review the options you can use to select picks for pick slip generation.

Pick Slip Preparation Setup Requirements

- [Pick Slip Generation Templates](#)
- [System Control Values](#)

For more information: See [Pick Slip Generation Setup Requirements](#) for more information on the setup required to run pick slip generation.

Pick Slip Generation Templates

Use the [Streamlined Pick Slip Generation Screen](#) to create pick slip generation templates to define the selection criteria the system uses to select pre-generated picks for fulfillment. Review the pick slip generation templates that you may have used in Standard Pick Slip Generation (WPSG) to determine the pick slip generation templates to create in Streamlined Pick Slip Generation.

System Control Values

System Control Value	Description
Reservation Lead Days (B27)	Enter the number of days after which an order (or order line) should be considered a future order and should not be reserved. The FUTURE periodic function (FLR0246) uses this number of days to determine when an order line's arrival date makes it eligible to reserve as a future order.
Pick Processing Days (B37)	Enter the number of days it takes your company, on average, to pick, pack, and ship an order. This is your internal lead time. This number determines when to create a pre-generated pick; see Selecting Order Lines for Pick Slip Preparation .
Split Special Handling Picks (L44)	Select this field to have pick slip preparation create a separate pre-generated pick for all items on an order that contain a special handling code. When you generate pick slips for the order, the system creates a separate PDF document for picks that contain items with special handling. Deselect this field to have pick slip preparation include items on the order that contain a special handling code on the same pre-generated pick as the other shippable items on the order (assuming another reason does not cause the system to split the order across multiple picks; see Splitting an Order Across Multiple Picks). When you generate pick slips for the order, the system does not create a separate PDF document for special handling items. See this system control value for examples.
Create Separate Picks for Ship for Pickup Orders (L89)	Select this field to have pick slip preparation create a separate pre-generated pick for each item on a ship-for-pickup order. When you generate pick slips for the order, the system submits each order line to Order Orchestration as a separate order. Deselect this field to have pick slip preparation include all reserved items within the warehouse on the same pre-generated pick. When you generate pick slips for the order, the system submits all items on the pick slip together, even if it creates a multi-line order. See Ship-for-Pickup Orders for background.

Selecting Order Lines for Pick Slip Preparation

In order for the system to perform pick slip preparation and create pre-generated picks, an order must meet the following requirements.

- The Order Header must be in an open status and not locked by a user.
- A line on the order must be reserved and in an open status.
- For each reserved, open order line:
 - The *Arrival date* cannot be a future arrival date. The system uses the arrival date defined for the order line or the order ship to if not defined at the line level; see [Arrival Date Calculation](#).
 - The *Cancel date* cannot fall within the time it takes to process and fulfill the pick slip. The system uses the cancel date defined for the order line or the order ship to if not defined at the line level; see [Cancel Date Calculation](#).
 - The *Quantity remaining* must be less than or equal to the *Quantity reserved* in the Reserved Order Line table.
 - The *Quantity remaining* in the Reserved Order Line table must be less than or equal to the *Quantity reserved - Quantity Printed* in the Order Detail table.
 - The *Quantity printed* in the Reserved Order Line table must be less than or equal to the *Quantity reserved* in the Order Detail table.

Also:

Ship complete orders: If the order is flagged as ship complete, all of the lines on the order must be reserved and in an open status.

Sets: If the order contains a set and the set and component items are coordinate grouped, all of the component items must be reserved and in an open status. If the set and component items are not coordinate grouped, at least one of the component items must be reserved and in an open status.

Coordinate-grouped items: Pick slip preparation is not applied to order lines that are assigned the same coordinate group number until all of the coordinate grouped lines are eligible for pick slip preparation.

Non-inventory items: If the only items on the order are non-inventory, the items do not need to be reserved, but must be in an open status in order to be eligible for pick slip preparation. The system creates a pre-generated pick for the non-inventory item, even if all other items on the order are not eligible for pick slip preparation; however, the system will not create a pre-generated pick for a non-inventory item if all other items on the order are backordered; when one or more backordered items are available, the system creates a pre-generated pick for the non-inventory item as well as for the available item(s).

Drop ship items: The system does not include drop ship items on a pre-generated pick.

Multiple recipients: If the order contains multiple recipients, the system evaluates each order ship to individually to determine if it qualifies for pick slip preparation.

Ship-for-pickup orders: If the [Create Separate Picks for Ship for Pickup Orders \(L89\)](#) system control value is selected, the system prepares a separate pick for each reserved order line.

Arrival Date Calculation

The system checks the arrival date for each line on an order to determine when to create a pre-generated pick.

Arrival Date from Order Line (or Order Ship To) - (Pick Processing Days (B37) + Ship Via Lead Days in WSHV) < or = Today's Date

The system creates a pre-generated pick for the order line if this system-calculated date is less than or equal to today's date; otherwise, the system does not create a pre-generated pick for the order line until the date is within the allotted time frame.

**Note:**

To retrieve the correct ship via lead days in [Working with SCF/Ship Via Values \(WSHV\)](#), the system uses the ship via on the order line (or order ship if not defined at the line level) and the SCF (first 3 digits of the postal code) and country code defined for the order ship to delivery address.

Cancel Date Calculation

The system checks the cancel date for each line on the order to determine whether to create a pre-generated pick.

Cancel Date > Today's Date + Pick Processing Days (B37) + Ship Via Lead Days in WSHV

The system creates a pre-generated pick for the order line if the cancel date is greater than this system-calculated date; otherwise, the system does not create a pre-generated pick for the order line.

Fields used in the arrival date and cancel date calculations:

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

You can define the arrival date for an order line on the [Work with Order Line Screen \(Changing/Adding an Item\)](#) and you can define an arrival date for an order ship to on the [Work with Order Screen](#). See [Reviewing Reservation Types](#).

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

You can define a cancel date for an order line on the [Work with Order Line Screen \(Changing/Adding an Item\)](#) and you can define a cancel date for an order ship to on the [Work with Order Screen](#).

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

You use the [Pick Processing Days \(B37\)](#) system control value to define your pick processing days.

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

When is Pick Slip Preparation Performed?

The system performs pick slip preparation when:

- An order is created; see [Pick Slip Preparation when an Order is Created](#).
- A user or the system updates an order; see [Pick Slip Preparation when an Order is Maintained](#).
- Pick slip generation (WSPS) cannot generate a pick slip; see [Pick Slip Preparation when Pick Slips are not Generated \(WSPS\)](#).

Pick Slip Preparation when an Order is Created

The system performs pick slip preparation when an order is created; see [Applying Pick Slip Preparation to an Order](#) for the updates that are performed.

Pick Slip Preparation...	applied to an order when:
Entering Orders	The system performs the final order accept. If the order contains multiple recipients, the system does not perform pick slip preparation until you accept the last order ship to on the order.
<i>Generic Order Interface (Order API)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Order Administration receives the order through the Generic Order Interface (Order API) and it is not placed in an error status. Pick slip preparation occurs after the system generates the Order Response.
Working with Error Order Batches	You select to Edit/Accept the order batch. The system performs pick slip preparation only for orders that are accepted in the order batch.
dGenerating Membership Orders (EGMO)	Order Administration generates a membership order.

Pick Slip Preparation when an Order is Maintained

The system performs pick slip preparation when a user or the system updates an order. In this situation, the system performs the following updates.

1. The system REMOVES any pick slip preparation from the order; see [Removing Pick Slip Preparation from an Order](#) for the updates that are performed.
2. Once the changes to the order have been made, the system EVALUATES the order to determine if it is eligible for pick slip preparation.
3. If the order is eligible for pick slip preparation after the changes to the order have been made, the system RE-APPLIES pick slip preparation to the order; see [Applying Pick Slip Preparation to an Order](#) for the updates that are performed.

Pick Slip Preparation...	removed and reapplied to an order when:
Performing Order Maintenance	Removed when you select the order for maintenance, across all order ship tos. Reapplied when you accept or reject the order maintenance changes, across all order ship tos.
Releasing Held Orders	You release an order from hold and its status changes to Open. See Manage Held Orders in Modern View online help.
Working with Tickler Users/User Groups (WTIC)	You release an order from hold and its status changes to Open.
Working with Held Detail Lines (WOHD)	You select Release to release an order line from hold or select Batch Release to release multiple order lines from hold.
Evaluate Future Orders periodic function (program name FLR0246)	An order is reserved and updated to an open status.
Working with the EBO_ASYNC Job (MBJC)	Stock is reserved against an order.

Pick Slip Preparation...	removed and reapplied to an order when:
Evaluate Backorder Reasons without Backorder Warehouse periodic function (program name PFR0024)	An item on backorder is reserved.
Reserve Backorders periodic function (program name FLR0804)	An item on backorder is reserved.
Processing Auto Soldout Cancellations (MASO)	- An order is flagged as ship complete and the item that was preventing a pre-generated pick from being created for the order is soldout, or - Items on the order are assigned to the same coordinate group and the item in the group that was preventing a pre-generated pick from being created for the order is soldout.
Working with Return Authorizations (WRTA) and Receiving Returns (WRAR)	Removed when you select an order for return authorization. Reapplied when you accept or reject the return authorization. If you add an exchange item, the system performs pick slip preparation for the exchange item when you receive the return authorization.
Working with Interactive Reservation (MIRV)	Removed when you: - scan by order number. - scan by customer class and select an order. - scan by item/SKU and perform an action against an item on the order. Reapplied when you exit the screen.
Processing Item Substitutions (PSUB)	You substitute an item that is on backorder with an item that is in stock.
Inventory Transaction Upload XML Message (inCreateInvXaction) For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	The system unreserves an order to perform a negative adjustment.
Release Order on Time Hold periodic function (program name CSR0557)	An order is released from hold.
Working with Backorders Pending Cancellation (WBPC)	You cancel an item that is on backorder and the order is flagged as ship complete or the item being cancelled is the item that prevented a pre-generated pick from being created for the order.
Working with Credit Card Cancellations (WCCC)	You cancel orders whose credit cards have been declined by the authorization service. NOTE: Because the order is cancelled, the system removes pick slip preparation from the order and does not reapply it.
Working with Inventory Transaction Errors (WITE)	An order is unreserved.
Processing Refunds (MREF)	You refund a stored value card item, causing the system to add a new stored value card item to the order and create a pre-generated pick for the new card.

Pick Slip Preparation...	removed and reapplied to an order when:
Reset Allocation Quantities (MRPC)	You perform the reset. NOTE: To reduce the amount of time it takes to run this process, you should use Streamlined Pick Slip Generation (WSPS) to generate pick slips for as many orders as possible.
Unlocking a Stranded Order or Batch (MULO)	You unlock an order.
Reprinting and Voiding Pick Slips (WVRP or WSVP)	You void a pick slip. NOTE: - If the pick slip is voided and unreserved, the system removes pick slip preparation and does not reapply it to the order. - If the pick slip is reprinted, the system does not perform pick slip preparation.
<i>Generic Pick In API (Shipments, Voids, and Backorders)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	The <i>transaction_type</i> for a <i>CWPickIn XML Message</i> is B (full or partial backorder) or V (void). For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). NOTE: The Generic Pick In API is available only for pick slips that have been fulfilled and printed through Streamlined Pick Slip Generation (WSPS) ; you cannot use the Generic Pick In API for pre-generated picks (picks in a G Generated No Authorization or H Generated Has Authorization status).
NO (New Orders) Event Processing	A NO New Order tickler is created. NOTE: If the order is placed on hold, the system does not reapply pick slip preparation to the order.
VP (Voided Pick Tickets) Event Processing	A VP Voided Pick Tickets tickler is created. NOTE: If the order is placed on hold, the system does not reapply pick slip preparation to the order.

Pick Slip Preparation when Pick Slips are not Generated (WSPS)

If the system cannot generate a pick slip during pick slip generation, the system determines the updates that need to be performed for pick slip preparation.

Pick Slip Not Generated Because:	Pick Slip Preparation Updates:
Declined Authorizations During Pick Slip Generation	The system: - Deletes the pick slip. - Prints the order on the declined Credit Card Authorization Listing. - If the order is not placed on hold, creates a pre-generated pick in a G Generated No Authorization status. NOTE: If the authorization remains in an S Sent status, the system updates the status of the pick to W Waiting for Authorization and does not delete it.

Pick Slip Not Generated Because:	Pick Slip Preparation Updates:
Allocating Stock Error	If a stock allocation error occurs and the Withhold Picks due to Item Allocation Error (F04) system control value is selected, the system: - Deletes all pre-generated picks for the order. - Does not print a pick slip for the item which created an allocation error, or for any item that is on the same ORDER as the item that has the item stock allocation error, regardless if the other items on the order were created on a separate pre-generated pick. - Prints the item with the stock allocation error on the Item Stock Allocation Error Report. - Creates new pre-generated picks for the order. If a stock allocation error occurs and the Withhold Picks due to Item Allocation Error (F04) system control value is unselected, the system: - Prints a pick slip for the items not in error, with the item associated with the stock allocation error in a backorder status. - Deletes the pre-generated pick for the item with the stock allocation error. - Prints the item with the stock allocation error on the Item Stock Allocation Error Report. - Creates a new pre-generated pick for the item with the stock allocation error. NOTE: If the item that has the item stock allocation error is part of a set or is part of a coordinate group, the system holds the other items that are part of the set or coordinate group. See the Withhold Picks due to Item Allocation Error (F04) system control value for examples.
Stored value card number not assigned during pick slip generation	If the system cannot assign a card number to a virtual stored value card or a card using the Oracle Retail Customer Engagement Stored Value Card integration, the system: - Deletes the pick slip. - Prints the stored value card item on the Stored Value Card Assignment Errors Report. - Recreates the pre-generated pick, removing the <i>Billing batch number</i> and <i>Date and Time printed</i> that was assigned during pick slip generation. See Assigning a Stored Value Card Number.
Order Orchestration indicates the retail pickup or delivery order has been canceled	If Order Administration sends pick slip information to Order Orchestration and Order Orchestration indicates the order or line has been canceled, the system: - Deletes the pick slip. - Puts the order on hold using the Order Broker Hold Reason (Cancel) (L02). - Does not recreate the pre-generated pick since the order is on hold. See Retail Pickup (including Ship-for-Pickup) or Delivery Orders and the Use OROB Status Inquiry List Web Service (M05) system control value.

Pick Slip Not Generated Because:	Pick Slip Preparation Updates:
Order Orchestration indicates the retail pickup or delivery order is under review	If Order Administration sends pick slip information to Order Orchestration and Order Orchestration indicates the order is under review, the system: - Deletes the pick slip. - Puts the order on hold using the AU hold reason (BROKER ORDER UNDER REVIEW). - Does not recreate the pre-generated pick since the order is on hold. See Retail Pickup (including Ship-for-Pickup) or Delivery Orders and the Use OROB Status Inquiry List Web Service (M05) system control value.
Error During Ship-for-pickup Order Processing	If Order Administration sends pick slip information to Order Orchestration and Order Orchestration returns an error, the system: - Does not print a pick slip. - Writes an order transaction history message: Submit Order Failed - OROB Unavailable. - Puts the order on hold using the Hold Reason for Errored Ship for Pickup Orders (L10). - Does not recreate the pre-generated pick since the order is on hold. See Ship-for-Pickup Orders.

Batch Pick Slip Preparation

The PICKRFH Pick Gen Refresh periodic function (program name PFR0103) allows you to submit a process that evaluates orders for pick slip preparation, and if eligible:

1. Removes any pick slip preparation that may have already occurred for the order; see [Removing Pick Slip Preparation from an Order](#) for the updates that are performed.
2. Applies pick slip preparation to the order; see [Applying Pick Slip Preparation to an Order](#) for the updates that are performed.

Use this periodic function to:

- Initially prepare existing orders for pick slip generation; see [Converting Orders to Pick Slip Preparation](#).
- Perform pick slip preparation for orders that initially were not eligible for pick slip preparation (for example, the order had a future arrival date).

See [How to Schedule a Job](#) for instructions on assigning this periodic function to a periodic process and to schedule when the process runs.



Note:

Oracle recommends you run this periodic function on a daily basis.

Logging: For each eligible order, the system writes a message to the [Trace Log](#) if its [Logging Level](#) is set to ERROR or higher.

Converting Orders to Pick Slip Preparation

Use the following steps to apply pick slip preparation to existing open and reserved orders.

Before running the PICKRFH Pick Gen Refresh periodic function and to minimize the amount of time it takes to convert orders to pick slip preparation, you should:

- Make sure you have a current backup of the Order Administration database.
- Use [Streamlined Pick Slip Generation \(WSPS\)](#) to generate pick slips for as many orders as possible to reduce the number of orders that require pick slip preparation.

To estimate the time it will take you to run the conversion process, to perform pick slip preparation for 11,000 orders takes roughly 68 minutes; however, based on your system, your time may vary.

To run the conversion process:

1. Log all users off Order Administration and stop any batch jobs, such as Background Asyncs (MBJC) and any Integration Layer Jobs (IJCT). This ensures there are no locks on the Order and Pick tables, no new orders are created during the conversion process, and reduces the conversion time.
2. Log in to Order Administration and verify you are in the company you wish to convert.
3. In [Executing Periodic Processes \(EPRO\)](#), select the CVTIAPICK periodic process and select OK.
4. At the [First Execute Periodic Process Screen \(Setting Parameters\)](#), enter the company you wish to convert and select OK.
5. On the [Second Execute Periodic Process Screen \(Selecting Functions\)](#), select Execute. The system submits the CVTIAPICK job.
6. Once the CVTIAPICK job completes, open the Trace Log and verify the system wrote a message indicating the conversion completed. The message should be similar to the following: `PickGen Refresh completed. It generated picks for approximately 9999 orders.`

Once the conversion process completes, you can allow users back in the system.

Applying Pick Slip Preparation to an Order

For orders that qualify for pick slip preparation, the system performs the following updates.

- [Creates Pre-Generated Picks](#)
- [Updates Reserved Order Lines for the Order](#)
- [Updates Authorizations for the Order](#)

For more information: See [Selecting Order Lines for Pick Slip Preparation](#) and [When is Pick Slip Preparation Performed?](#) for more information on determining when an order line is eligible for pick slip preparation, and when the system performs pick slip preparation.

Creates Pre-Generated Picks

When creating pre-generated picks for an order, the system performs the following updates.

Splits an order across multiple picks: The system may split an order into multiple pre-generated picks for several reasons; see [Splitting an Order Across Multiple Picks](#).

Flags a pick as the first pick: If a pick doesn't already exist for the order that is flagged as the first pick, the system flags the pre-generated pick as the first pick. If multiple pre-generated picks are created for the order, the system flags one of the picks as the first pick. If a pick contains only bill immediately items (such as virtual stored value card items, membership items, and subscription items), the system flags this pick as the first pick.

- If the *Prorate Freight Charges (D39)* system control value is unselected, the system charges all freight charges on an order with the first shipment; in this situation, all freight charges are added to the pick the system flags as the first pick.
- If the *Prorate Freight Charges (D39)* system control value is selected, the system charges a proportional amount of freight for partial shipments on an order. However, if the *Prorate Freight Charges (D39)* system control value is selected and all of the items on the order are exempt from freight, the system applies any item and weight charges defined for the ship via to the pick the system flags as the first pick.



Note:

If the pick flagged as the first pick is NOT selected for the first pick slip generation run for the order, the system:

- Updates the *First pick* field in the Pick Control Header table for the pick that is included in the pick slip generation run to Y and looks at the setting of the *Prorate Freight Charges (D39)* system control value to determine how to apply freight charges.
- Updates the *First pick* field in the Pick Control Header table for the pick that was originally flagged as the first pick to N.

Recalculates tax: The system recalculates the tax for each pick created.

Creates a record in the Pick Control Header table: The system creates a record in the Pick Control Header table for each pick created for the order; see [Creating Pre-Generated Picks](#) for information on the fields that are updated. If the [Split Special Handling Picks \(L44\)](#) system control value is selected, the system creates a separate Pick Control Header record for all items on the order that contain a special handling code.

Creates a record in the Pick Control Detail table: The system creates a record in the Pick Control Detail table for each item on the order that qualifies for pick slip preparation; see [Creating Pre-Generated Picks](#) for information on the fields that are updated.

Creates a record in the Pick Stored Value Card table: The system creates a record in the Pick Store Value Card table for each physical stored value card item included on the pre-generated pick.

Viewing pre-generated picks: You can review pre-generated picks on the [Display Pick Tickets for Order Screen](#) in Order Inquiry. The status of the pick will be either G Generated No Authorization or H Generated Has Authorization; see [Pick status](#) for more information on how the system determines the status of the pre-generated pick.



Note:

Picks in a G or H status will not display on the [Display Pick Tickets for Order Screen](#) in Order Maintenance because the system removes these picks when you advance to Order Maintenance and does not recreate them until you accept or reject out of Order Maintenance.

Updates Reserved Order Lines for the Order

The system updates the Reserved Order Line table for the order:

- Increments the *Qty printed* by the quantity on the Pick Control Detail.

- Decrements the *Qty remaining* by the quantity on the Pick Control Detail.

You can review the reserved order lines on an order on the [Display Reserved Order Lines Screen](#) in Order Inquiry.



Note:

The system does not update the *Qty printed* in the Order Detail table during pick slip preparation; this update occurs during pick slip generation. You can review the quantity printed for an order detail line on the [Order Inquiry Detail Screen](#).

Updates Authorizations for the Order

If the credit card payment on the order has been authorized, the system performs the following updates.

Determines if the authorization has expired: If the authorization for the credit card payment has expired, the system:

- Updates the *Status* of the Authorization History record to E Expired.
- Reduces the *Amount authorized* on the Order Payment Method by the expired authorization amount.
- Reduces the Void Auths record by the expired authorization amount.

You can review authorizations in an E Expired status on the [Display Authorization History Screen](#) in Order Inquiry.

If the authorization for the credit card payment has NOT expired, the system performs the updates below.

Creates an Authorization History record if it does not yet exist: The record contains:

- A *Status* of A Authorized if the credit card was authorized using online authorization, or G Generated if the credit card contains a manual authorization. Once a pick associated with a manual authorization is printed, the system updates the status to A Authorized.
- The authorization date defined for the payment (or the current date if an authorization date was not defined).
- The authorization number defined for the payment.
- The authorization amount defined for the payment (or the *Total Order Amount* for the Pick Control Header if an authorization amount was not defined).

You can review authorizations in an A Authorized and G Generated status on the [Display Authorization History Screen](#) in Order Inquiry.

Creates an Authorization History Pick record: The system creates an Auth History Pick record for each pre-generated pick created for the order.

Creates an Order Transaction History record: A message similar to the following is created if a manual authorization exists on the order, where TST3442 is the authorization number, 99.99 is the authorization amount, and OEPICKAUTH is the user:

```
AUTH MANUAL AUTH# DETECTED - TST3442 99.99 OEPICKAUTH
```

You can review order history on the [Display Order History Screen](#).

Updates authorizations for the Order Payment Method:

If the [Pick status](#) for the Pick Control Header record is H Generated Has Authorization, the system:

- Removes the *Authorization date*, *Authorization number*, and *Manual authorization amount* from the Order Payment Method.
- Updates the *Amount authorized* with the authorization amount.

If the [Pick status](#) for the Pick Control Header record is G Generated No Authorization, the system:

- Retains the *Authorization date*, *Authorization number*, and *Manual authorization amount* for the Order Payment Method.
- Does not update the *Amount authorized*.
- Creates a record in the Void Auths table for the amount authorized.

You can review this information on the [Display Order Pay Type Screen \(1 of 2\)](#).

Creates a record in the Void Auths table: The system creates a record in the Void Auths table when:

- The credit card payment on the order has been authorized, but the [Pick status](#) for the Pick Control Header record is G Generated No Authorization.
- The *Manual authorization amount* for the Order Payment Method is greater than the *Total Order Amount* for the Pick Control Header; in this situation, the system takes the difference and creates a Void Auths record for the amount. Example: If the *Manual authorization amount* is 50.00 and the *Total Order Amount* is 30.00, the system creates a Void Auths record for 20.00.
- The credit card payment on the order has been authorized, but the order is not eligible for pick slip preparation (for example, the order is placed on hold).

Splitting an Order Across Multiple Picks

The system splits an order into several pre-generated picks for any of the following reasons.

Important:

If you change an item in [Work with Item/SKUs \(MITM\)](#) or change a ship via in [Working with Ship Via Codes \(WVIA\)](#) after a pre-generated pick has been created, the system does not recreate the picks based on the updated information. You must change the order to trigger the system to remove and reapply pick slip preparation to the order.

Reason to Split an Order	Description
Different warehouse for item	An order line on the order is in a different warehouse than other order lines on the order, or a single order line on the order is reserved from multiple warehouses. Example: If item A123 is reserved in warehouse 1 and items B123 and C123 are reserved in warehouse 2, the system creates a Pick Control record for item A123 and a separate Pick Control record for items B123 and C123. NOTE: The system also creates a separate pick slip PDF document for picks based on warehouse; see Sorting Pick Slips into Separate PDF Documents.

Reason to Split an Order	Description
Different ship via for item	An order line on the order is assigned to a different ship via than other order lines on the order. Example: If item A123 is assigned ship via 1 and items B123 and C123 are assigned ship via 2, the system creates a Pick Control record for item A123 and a separate Pick Control record for items B123 and C123. NOTE: The system also creates a separate pick slip PDF document for picks based on warehouse; see Sorting Pick Slips into Separate PDF Documents.
Special handling for item	An item on the order requires special handling or personalization. The system splits an order by special handling only if the Split Special Handling Picks (L44) system control value is selected. This system control value also works in conjunction with the setting of the <i>Special Handling</i> field on the Streamlined Pick Slip Generation Screen. Example: See the Split Special Handling Picks (L44) system control value for examples. NOTE: If the Split Special Handling Picks (L44) system control value is selected, the system also creates a separate pick slip PDF document for picks based on special handling; see Sorting Pick Slips into Separate PDF Documents.
Physical stored value card	An item on the order is flagged as a physical stored value card. The system creates a separate Pick Control record for each order line that has a physical stored value card. Also, if the physical stored value card item is set up as a ship alone item, the system creates a separate Pick Control record for each unit of a stored value card item on an order line. You can flag an item as a physical stored value card at the Create Item Screen or Change Item screen. Example: An order has the following order lines. The stored value cards are NOT flagged to ship alone. - Order line 1: a physical stored value card for a quantity of 1. - Order line 2: a physical stored value card for a quantity of 2. - Order line 3: a regular item for a quantity of 1. Results: The system creates the following pre-generated picks: - A separate pre-generated pick for the regular item. - A separate pre-generated pick for the stored value card item for a quantity of 1. - A separate pre-generated pick for the stored value card item for a quantity of 2. See Stored Value Card Purchase and Activation for more information on generating pick slips for stored value card items.
Ship alone item	An item on the order is flagged to ship alone. Example: An order has the following order lines: - Order line 1: ship alone item for a quantity of 1. - Order line 2: ship alone item for a quantity of 2. - Order line 3: regular item for a quantity of 1. Results: The system creates the following pre-generated picks: - A separate pre-generated pick for the regular item. - A separate pre-generated pick for 1 unit of the ship alone item. - A separate pre-generated pick for 1 unit of the ship alone item. - A separate pre-generated pick for 1 unit of the ship alone item.

Reason to Split an Order	Description
Hazardous item	An item on the order is flagged as hazardous. Example: An order has the following order lines: - Order line 1: a hazardous item for a quantity of 1. - Order line 2: a hazardous item for a quantity of 2. - Order line 3: a regular item for a quantity of 1. Results: The system creates the following pre-generated picks: - A separate pre-generated pick for the regular item. - A separate pre-generated pick for all of the hazardous items.
Different location class for item	An item on the order has a different location class than other items on the order. NOTE: The system uses the location class defined at the item level. Example: An order has the following order lines: - Order line 1: item A123 assigned location class AA. - Order line 2: item B123 assigned location class BB. - Order line 3: item C123 assigned location class AA. Results: The system creates the following pre-generated picks: - A pre-generated pick for items A123 and C123 (location class AA). - A separate pre-generated pick for item B123 (location class BB).
Ship-for-pickup order	The order is a ship-for-pickup order and the Create Separate Picks for Ship for Pickup Orders (L89) system control value is selected. Example: An order has the following order lines: - Order line 1: item A123. - Order line 2: item B123. Results: The system creates the following pre-generated picks: - A pre-generated pick for item A123. - A separate pre-generated pick for item B123. - When you generate pick slips, the system submits each order line to Order Orchestration as a separate ship-for-pickup order. - If the Create Separate Picks for Ship for Pickup Orders (L89) system control value is unselected and there is no other reason to split the pick slip, such as a ship-alone item, the system pre-generates a single pick and submits both order lines to Order Orchestration as a single order.

Creating Pre-Generated Picks

Pick Slip Preparation creates pre-generated picks in the Pick Control Header and Pick Control Detail tables when an order is created or changed. You can review pre-generated picks on the [Display Pick Tickets for Order Screen](#).

- [Pick Control Header Updates for Pre-Generated Picks](#)
- [Pick Control Detail Updates for Pre-Generated Picks](#)

Restrictions: The following options are not available until after you use [Streamlined Pick Slip Generation \(WSPS\)](#) to fulfill and print a pick slip:

- You cannot confirm and bill shipments for a pre-generated pick using the [Manually Confirming Shipments \(MCON\)](#) menu option.
- You cannot assign a number to a physical stored value card using the [Working with Physical Stored Value Card Assignment \(WPSA\)](#) menu option.

- You cannot use the *Generic Pick In API (Shipments, Voids, and Backorders)* for a pre-generated pick.
For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).
- Pre-generated picks do not display in the [Displaying Pick Slip Generation Inquiry \(DPSI\)](#) menu option.
- The *Printed* field in the [Reviewing Pending Orders \(DOSS\)](#) menu option does not include pre-generated picks.
- Pre-generated picks are not included in the [Reviewing Operations Control Summary \(FLSH\)](#) menu option.
- Pre-generated picks are not included in the [Ship Via/Item Inquiry \(SVII\)](#) menu option.
- Pre-generated picks are not included on the [Operations Control Report \(POCT\)](#).
- Pre-generated picks are not included on the [Carryover Report \(PCOR\)](#).

Pick Control Header Updates for Pre-Generated Picks

Pick Slip Preparation updates the following fields in the Pick Control Header table for pre-generated picks. The remaining fields are not updated until you run pick slip generation for the order.

Subscription items: The system creates a separate pre-generated pick for a subscription item (the *Subscription* and *Non-inventory* fields for the item are selected). When you generate pick slips for the order, the system bills the subscription item immediately and indicates on the pick slip that the subscription is shipping separately. See [Working with Item Subscriptions \(WISB\)](#).

Membership items: The system creates a separate pre-generated pick for a membership item (the *Membership* field for the item is selected). When you generate pick slips for the order, the system bills the membership item immediately and indicates on the pick slip that the membership is shipping separately.

Field	Pick Slip Preparation Update
Pick control #	The system assigns the next available number from the PCH Control # number assignment wheel. NOTE: The system assigns a new pick control number when a pre-generated pick is created, including when a pre-generated pick is deleted and then recreated because the order was updated by a user or the system.

Field	Pick Slip Preparation Update
Pick status	Defines whether the pre-generated pick requires authorization during pick slip generation. G Generated No Authorization = The pick requires authorization during pick slip generation. The system updates the pick status to G if: • A credit card payment method with another payment method exists on the order. • Multiple recipients exist on the order. • The Use Auto Authorization Interface (C14) system control value is selected and the order has a single credit card payment that: – does not have a valid authorization. – has an online or manual authorization that has expired. – has an online or manual authorization that does not cover the amount on the pre-generated pick. – is associated with a credit card authorization reversal. – has an online authorization whose status is not A Authorized. H Generated Has Authorization = The pick can bypass authorization processing during pick slip generation. The system updates the pick status to H if: • The Use Auto Authorization Interface (C14) system control value is unselected. • A pay category 2 Credit Card payment does not exist on the order. • The order total (merchandise amount + freight + tax + handling + additional charges + additional freight) for the order ship to is zero. • The Use Auto Authorization Interface (C14) system control value is selected and the order has a single recipient and credit card payment with a valid online or manual authorization (authorization status = A) that covers the amount on the pre-generated pick. NOTE: If an authorization amount is not defined for the manual authorization, the system uses the order total as the authorization amount. • The Use Auto Authorization Interface (C14) system control value is selected and the order has a single credit card payment whose pay type does not have an authorization service defined. • The order is a ship for pickup order (the <i>OST OBR delivery type</i> field in the Order Ship To table is set to S), the Payment at POS for Ship for Pickup Orders (L60) system control value is selected, and the order type does not match the order type defined in the Order Type for Special Orders (L15) system control value. NOTE: When Selecting Pre-Generated Picks for Pick Slip Generation, the system looks at Authorization History to determine if any picks in an H Generated Has Authorization status are associated with an expired authorization, and if so, the system changes the status of the pick to G Generated No Authorization.
Billing batch #	The system does not assign a billing batch number to a pre-generated pick; the system assigns a billing batch number to the pick during pick slip generation; see Selecting Pre-Generated Picks for Pick Slip Generation.

Field	Pick Slip Preparation Update
Date and Time of last update	The date and time when the system created the pre-generated pick. The system updates this field when a pre-generated pick is created, including when a pre-generated pick is deleted and then recreated because the order was updated by a user or the system.
Generation type	Defines whether the pick contains an item that requires special handling or whether the pick is billed immediately after pick slip generation. R Regular = The pick does not contain an item that requires special handling and is billed after the shipment is confirmed. S Special Handling = The pick contains an item that requires special handling and is billed after the shipment is confirmed. I Bill Immediately = The pick is confirmed and billed immediately after pick slip generation.
PO #	The purchase order number assigned to the order.
Merch	The merchandise amount on the pre-generated pick.
Freight	The freight amount on the pre-generated pick.
Add'l freight	The additional freight amount on the pre-generated pick.
Add'l charges	The additional charge amount on the pre-generated pick.
Handling	The handling amount on the pre-generated pick.
Tax	The tax amount on the pre-generated pick.
GST	The GST tax amount on the pre-generated pick.
PST	The PST tax amount on the pre-generated pick.
Total Order Amount	The total amount on the pre-generated pick.
First pick	Indicates whether this is the first pick for the order. Y = This is the first pick for the order. N = This is not the first pick for the order.
Order #	The order number associated with the pre-generated pick.
Ship to #	The order ship to associated with the pre-generated pick.
Ship via code	The shipper assigned to the pre-generated pick.
Last update by user	The process that created the Pick Control Header record.
Customer #	The sold to customer number on the order.
Warehouse	The warehouse assigned to the pre-generated pick. The system uses this warehouse during Pick Slip Allocation Processing .
Drop point	The drop point specified for the warehouse or for the warehouse/ship via/SCF combination if you are using zone skipping. See the Work with Ship Via Indicia Screen for an overview.
Country	The country code for the shipping address on the pick.
State	The state code for the shipping address on the pick.
Prefix	The prefix, first name, middle initial, last name and suffix of the ship to customer on the pick.
First Name	
Initial	
Last Name	
Suffix	
Apartment	The apartment for the shipping address on the pick.
Address line 2	The second address line for the shipping address on the pick.

Field	Pick Slip Preparation Update
City	The city for the shipping address on the pick.
Zip	The postal code for the shipping address on the pick.
Delivery code	Defines whether the shipping address is a residential or business address. B = Business address. R = Residential address. N = No distinction.
PO Box?	Defines whether the shipping address is a post office box. Y = The address is a post office box. N = The address is not a post office box.

Pick Control Detail Updates for Pre-Generated Picks

Pick Slip Preparation updates the following fields in the Pick Control Detail table for pre-generated picks. The remaining fields are not updated until you run pick slip generation for the order. The system creates a record in the Pick Control Detail table for each shippable line on the order that qualifies for pick slip preparation.

Backordered and drop ship items: The system does not create a Pick Control Detail record for any items on backorder or that are flagged as drop ship until you run pick slip generation for the order.

Non-inventory items: The system:

- Does not create a pre-generated pick for a non-inventory item if all other items on the order are backordered; when one or more backordered items are available, the system creates a pre-generated pick for the non-inventory item as well as for the available item(s).
- Creates a pre-generated pick for a non-inventory item if all other items on the order are not selected for pick slip preparation; see [Selecting Order Lines for Pick Slip Preparation](#).

Coordinate-grouped items: The system does not create a pre-generated pick for order lines that are assigned the same coordinate group number until all of the coordinate grouped lines are eligible for pick slip preparation.

Field	Pick Slip Preparation Update
Line #	The pick line number assigned to a shippable order line on the order.
Original qty printed	The quantity available to ship on the pick.
Qty printed	The same as the original quantity printed.
Affect inventory	Defines whether shipping the item affects the inventory count. Y = Affect inventory. N = Do not affect inventory.
Price	The single-unit selling price of the item after applying any repricing or discounts.
PCD Extension	The selling price times the printed quantity.
Freight charge	The freight charge for the item on the pick. Included only if there is a printed quantity and the source code uses an item-level freight method.
Spec Handling \$	The total special handling charges for the item.

Field	Pick Slip Preparation Update
Gift Charge	The total giftwrap charge.
Qty Ordered	The original quantity ordered for the order detail line.
Tax	The total tax amount for the item on the pick.
GST	The total GST tax amount for the item on the pick.
PST	The total PST tax amount for the item on the pick.
Order #	The order number associated with the pick.
Ship to #	The order ship to associated with the pick.
Seq #	The order line sequence number.
ITM Number	A code for the item on the pick.
SKU Code	A code for the item's unique characteristics, such as color and size, on the pick.
Add'l chg code	The additional charge code related to special handling for the item on the pick.

Removing Pick Slip Preparation from an Order

The system REMOVES any pick slip preparation that may have already occurred when you or the system changes an order; see [When is Pick Slip Preparation Performed?](#) to review when the system removes pick slip preparation from an order.

The system:

- Deletes the pre-generated picks for the order in the Pick Control Header, Pick Control Detail, Pick Control Label, and Pick Stored Value Card tables that are in a G Generated No Authorization or H Generated Has Authorization status, across all order ship tos.
- Resets the *Qty printed* and *Qty remaining* fields for the order in the Reserved Order Lines table.
- If pick slips have not been generated for the order and the order contains an online authorization:
 - Retains records for the order in the Authorization History table that are in a status other than G Generated.
 - Updates the *Amount authorized* in the Order Payment Method table to 0.00.
 - Creates a record in the Void Auths table for the amount authorized in the Authorization History table.
- If pick slips have not been generated for the order and the order contains a manual authorization:
 - Deletes records for the order in the Authorization History table that are in a G Generated status (the system retains records in any other status).
 - Removes any message for the order in the Order Transaction History table regarding a manual auth detected.
 - Restores any manual authorization information for the order in the Order Payment Method table.
 - Deletes any records for the order payment in the Void Auths table.

**Note:**

After removing pick slip preparation from an order and updating the order with any changes, the system evaluates the order to determine if it is eligible for pick slip preparation, and if it is, the system RE-APPLIES pick slip preparation to the order; see [Pick Slip Preparation when an Order is Maintained](#).

Pick Slip Preparation Examples

Examples of how the system performs pick slip preparation when an order is created or updated are described below.

- [Example 1: Pick Slip Preparation when Order is Created with no Authorization](#)
- [Example 2: Pick Slip Preparation when Order is Created with Online Authorization](#)
- [Example 3: Pick Slip Preparation when Order is Created with Manual Authorization](#)
- [Example 4: Pick Slip Preparation when an Order is Maintained](#)

Example 1: Pick Slip Preparation when Order is Created with no Authorization

You create an order that contains the following information:

Order Header:

- Arrival date = today's date
- Ship via = 1

Order Detail:

Line#	Item	Status	Arrival Date	Reserve Qty	Ship Via	Whs
1	A1	Open	today's date	1	1	1
2	B1	Open	today's date	2	1	1
3	C1	Backorder	today's date	0	1	1

Order Payment:

Pay category	Authorization Date	Authorization Amount
2 Credit Card	blank	blank

Pick slip preparation: When you accept the order, the order does not go on hold. The system: Creates one pre-generated pick for the order in a G Generated No Authorization status:

Pick Control#	Status	Last Update	Gen Type	First Pick	Whs	Ship Via
5051	G	Current date	R Regular	Y	1	1

Creates two pick control details for the pre-generated pick:

Pick Control#	Item	Qty Printed
5051	A1	1

Pick Control#	Item	Qty Printed
5051	B1	2

Updates the *Qty printed* and *Qty Remaining* for the reserved order lines on the order:

Line#	Whs	Reserved	Printed	Remaining	Reservation Date
1	1	1	1	0	today's date
2	1	2	2	0	today's date

Pick slip generation: When you process pick slip generation for the order, the system:

- Assigns a billing batch number to the pick.
- Updates the *Date last update* to the date when pick slip generation is run.
- Updates the *Date printed* to the date when pick slip generation is run.
- Updates the *Status* of the pick from G Generated No Authorization to 1 Waiting for Authorization.
- Performs batch authorization for the pick; see [Authorizations During Pick Slip Generation](#).
- Determines which item/locations to reserve stock from in order to fulfill the quantity required for the pick; see [Allocating Stock](#).
- Sorts the picks so that they generate and print in the correct order. The sort also determines when the system creates a new pick slip PDF document for the picks in the pick slip generation run. See [Sorting Pick Slips into Separate PDF Documents](#) and [Pick Slip Sort within a Pick Slip PDF Document](#).
- Groups the picks into documents for printing; see [Generating and Printing Pick Slips](#).

Example 2: Pick Slip Preparation when Order is Created with Online Authorization

You create an order that contains the following information:

Order Header:

- Arrival date = today's date
- Ship via = 1
- Order total = 100.00

Order Detail:

Line#	Item	Status	Arrival Date	Reserve Qty	Ship Via	Whs
1	A1	Open	today's date	1	1	1
2	B1	Open	today's date	2	1	1
3	C1	Backorder	today's date	0	1	1

Order Payment:

Pay category	Authorization Date	Authorization Amount
2 Credit Card	today's date	110.00 (10.00 greater than order amount)

Pick slip preparation: When you accept the order, the order does not go on hold. The system:
Creates one pre-generated pick for the order in an H Generated Has Authorization status:

Pick Control#	Status	Last Update	Gen Type	First Pick	Whs	Ship Via
5052	H	Current date	R Regular	Y	1	1

Creates two pick control details for the pre-generated pick:

Pick Control#	Line#	Qty Printed	Item
5052	1	1	A1
5052	2	2	B1

Updates the *Qty printed* and *Qty Remaining* for the reserved order lines on the order:

Line#	Whs	Reserved	Printed	Remaining	Reservation Date
1	1	1	1	0	today's date
2	1	2	2	0	today's date

Updates authorizations history for the order:

Status	Auth Amt	Auth#	Auth Date
A Authorized	110.00	TST1	today's date

Updates the Order Payment Method:

- Removes the *Authorization date*, *Authorization number*, and *Manual authorization amount*.
- Updates the *Amount authorized* with the authorization amount.

Creates a Void Auths record for 10.00 since the authorization amount (110.00) is greater than the order total (100.00).

Pick slip generation: When you process pick slip generation for the order, the system:

- Assigns a billing batch number to the pick.
- Updates the *Date updated* to the date when pick slip generation is run.
- Updates the *Date printed* to the date when pick slip generation is run.
- Updates the *Status* of the pick from H Generated Has Authorization to 2 Authorized.
- Skips batch authorization for the pick.
- Determines which item/locations to reserve stock from in order to fulfill the quantity required for the pick; see [Allocating Stock](#).
- Sorts the picks so that they generate and print in the correct order. The sort also determines when the system creates a new pick slip PDF document for the picks in the pick slip generation run. See [Sorting Pick Slips into Separate PDF Documents](#) and [Pick Slip Sort within a Pick Slip PDF Document](#).
- Groups the picks into documents for printing; see [Generating and Printing Pick Slips](#).

Example 3: Pick Slip Preparation when Order is Created with Manual Authorization

You create an order that contains the following information:

Order Header:

- Arrival date = today's date
- Ship via = 1
- Order total = 100.00

Order Detail:

Line#	Item	Status	Arrival Date	Reserve Qty	Ship Via	Whs
1	A1	Open	today's date	1	1	1
2	B1	Open	today's date	2	1	1
3	C1	Backorder	today's date	0	1	1

Order Payment:

Pay category	Authorization Date	Authorization Amount
2 Credit Card	today's date	110.00 (10.00 greater than order amount)

Pick slip preparation: When you accept the order, the order does not go on hold. The system:
Creates one pre-generated pick for the order in an H Generated Has Authorization status:

Pick Control#	Status	Last Update	Gen Type	First Pick	Whs	Ship Via
5053	H	Current date	R Regular	Y	1	1

Creates two pick control details for the pre-generated pick:

Pick Control#	Line#	Qty Printed	Item
5053	1	1	A1
5053	2	2	B1

Updates the *Qty printed* and *Qty Remaining* for the reserved order lines on the order:

Line#	Whs	Reserved	Printed	Remaining	Reservation Date
1	1	1	1	0	today's date
2	1	2	2	0	today's date

Updates authorizations history for the order:

Status	Auth Amt	Auth#	Auth Date
G Generated	110.00	TST1	today's date

Creates an order transaction history message for the manual authorization:

Type	Transaction Note	Amount	User
AUTH	MANUAL AUTH# DETECTED - TST1	110.00	OEPICKAUTH

Updates the Order Payment Method:

- Removes the *Authorization date*, *Authorization number*, and *Manual authorization amount*.
- Updates the *Amount authorized* with the authorization amount.

Creates a Void Auths record for 10.00 since the authorization amount (110.00) is greater than the order total (100.00).

Pick slip generation: When you process pick slip generation for the order, the system:

- Assigns a billing batch number to the pick.
- Updates the *Date updated* to the date when pick slip generation is run.
- Updates the *Date printed* to the date when pick slip generation is run.
- Updates the *Status* of the pick from H Generated Has Authorization to 2 Authorized.
- Skips batch authorization for the pick.
- Determines which item/locations to reserve stock from in order to fulfill the quantity required for the pick; see [Allocating Stock](#).
- Sorts the picks so that they generate and print in the correct order. The sort also determines when the system creates a new pick slip PDF document for the picks in the pick slip generation run. See [Sorting Pick Slips into Separate PDF Documents](#) and [Pick Slip Sort within a Pick Slip PDF Document](#).
- Groups the picks into documents for printing; see [Generating and Printing Pick Slips](#).

Example 4: Pick Slip Preparation when an Order is Maintained

You create an order that contains the following information:

Order Header:

- Arrival date = today's date
- Ship via = 1
- Order total = 100.00

Order Detail:

Line#	Item	Status	Arrival Date	Reserve Qty	Ship Via	Whs
1	A1	Open	today's date	1	1	1
2	B1	Open	today's date	2	1	1
3	C1	Backorder	today's date	0	1	1

Order Payment:

Pay category	Authorization Date	Authorization Amount
2 Credit Card	today's date	110.00 (10.00 greater than order amount)

Pick slip preparation: When you accept the order, the order does not go on hold. The system:
Creates one pre-generated pick for the order in an H Generated Has Authorization status:

Pick Control#	Status	Last Update	Gen Type	First Pick	Whs	Ship Via
5054	H	Current date	R Regular	Y	1	1

Creates two pick control details for the pre-generated pick:

Pick Control#	Line#	Qty Printed	Item
5054	1	1	A1
5054	2	2	B1

Updates the *Qty printed* and *Qty Remaining* for the reserved order lines on the order:

Line#	Whs	Reserved	Printed	Remaining	Reservation Date
1	1	1	1	0	today's date
2	1	2	2	0	today's date

Updates authorizations history for the order:

Status	Auth Amt	Auth#	Auth Date
G Generated	110.00	TST1	today's date

Creates an order transaction history message for the manual authorization:

Type	Transaction Note	Amount	User
AUTH	MANUAL AUTH# DETECTED - TST1	110.00	OEPICKAUTH

Updates the Order Payment Method:

- Removes the *Authorization date*, *Authorization number*, and *Manual authorization amount*.
- Updates the *Amount authorized* with the authorization amount.

Creates a Void Auths record for 10.00 since the authorization amount (110.00) is greater than the order total (100.00).

Maintain order: You advance to Order Maintenance for the order. As soon as you advance to Order Maintenance for the order, the system removes all pick slip preparation from the order.

You add an item to the order.

Order Detail:

Line#	Item	Status	Arrival Date	Reserve Qty	Ship Via	Whs
1	A1	Open	today's date	1	1	1
2	B1	Open	today's date	2	1	1

Line#	Item	Status	Arrival Date	Reserve Qty	Ship Via	Whs
3	C1	Backorder	today's date	0	1	1
4	D1	Open	today's date	1	1	2

Pick slip preparation: When you accept the order, the order does not go on hold. The system:

Because the new item added to the order has a different warehouse, the system creates two pre-generated picks for the order in a G Generated No Authorization status (since the authorization amount no longer covers the shippable amount on the order):

Pick Control#	Status	Last Update	Gen Type	First Pick	Whs	Ship Via
5055	G	Current date	R Regular	Y	1	1
5056	G	Current date	R Regular	N	2	1

Creates two pick control details for the first pre-generated pick and 1 pick control detail for the second pre-generated pick:

Pick Control#	Line#	Qty Printed	Item
5055	1	1	A1
5055	2	2	B1
5056	4	1	D1

Updates the *Qty printed* and *Qty Remaining* for the reserved order lines on the order:

Line#	Whs	Reserved	Printed	Remaining	Reservation Date
1	1	1	1	0	today's date
2	1	2	2	0	today's date
4	1	1	1	0	today's date

Updates authorizations history for the order:

Status	Auth Amt	Auth#	Auth Date
G Generated	110.00	TST1	today's date

Creates an order transaction history message for the manual authorization:

Type	Transaction Note	Amount	User
AUTH	MANUAL AUTH# DETECTED - TST1	110.00	OEPICKAUTH

Updates the Order Payment Method:

- Removes the *Authorization date*, *Authorization number*, and *Manual authorization amount*.
- Updates the *Amount authorized* with the authorization amount.

Creates a Void Auths record for 10.00 since the authorization amount (110.00) is greater than the order total (100.00).

Pick slip generation: When you process pick slip generation for the order, the system:

- Assigns a billing batch number to each pick.
- Updates the *Date updated* to the date when pick slip generation is run.
- Updates the *Date printed* to the date when pick slip generation is run.
- Updates the *Status* of the pick from G Generated No Authorization to 1 Waiting for Authorization.
- Performs batch authorization for each pick.
- Determines which item/locations to reserve stock from in order to fulfill the quantity required for the pick; see [Allocating Stock](#).
- Sorts the picks so that they generate and print in the correct order. The sort also determines when the system creates a new pick slip PDF document for the picks in the pick slip generation run. Because a different warehouse is defined for each pick, the system sorts the picks into separate pick slip PDF documents. See [Sorting Pick Slips into Separate PDF Documents](#) and [Pick Slip Sort within a Pick Slip PDF Document](#).
- Groups the picks into documents for printing; see [Generating and Printing Pick Slips](#).

Performing Pick Slip Generation

Purpose: Pick slip generation controls the warehouse workload by determining the volume and type of orders to print. Use this program to print pick slips as needed.

In this topic:

- [Pick Slip Generation Overview](#)
- [Pick Slip Generation Setup Requirements](#)
- [Drop Ship Pick Slips](#)
- [Selecting Pre-Generated Picks for Pick Slip Generation](#)
- [Authorizations During Pick Slip Generation](#)
- [Allocating Stock](#)
- [Pick Slip Allocation Processing](#)
- [Streamlined Allocation](#)
- [Allocation Processing Against Multiple Locations](#)
- [Examples: Allocation Against Multiple Locations](#)
- [Allocation Processing Against Primary Primary Location](#)
- [Examples: Allocation Against Primary Primary Location](#)
- [Confirming and Billing the Pick Slip Immediately](#)
- [Let Down Replenishment](#)
- [Let Down Replenishment Processing](#)
- [Let Down Replenishment Example](#)
- [Sorted Pick Sort GH Table](#)
- [Sorting Pick Slips into Separate PDF Documents](#)

- [Pick Slip Sort within a Pick Slip PDF Document](#)
- [Using Cart/Bin Picking](#)
- [Sorting Pick Slips into Separate Cart Batches](#)
- [Pick Slip Sort Within a Cart Batch](#)
- [Generating and Printing Pick Slips](#)
- [Available Pick Slip Generation Documents](#)

Pick Slip Generation Overview

To perform pick slip generation, select Gen Picks for a pick slip generation template on the [Work with Streamlined Pick Slip Generation Screen](#). The system submits the PICK_GEN job. By default, this job is submitted to the PICKGEN job queue at the [Job Management Screen](#) rather than the QBATCH job queue.

PICKGEN job queue: In order to avoid errors during pick slip generation, DO NOT route the PICK_GEN job from the PICKGEN job queue. The PICKGEN job queue processes one job at a time. If a PICKGEN job is running and another job is submitted, the job remains in a RDY status until the PICKGEN job queue is available to process it.

Preparing an order for pick slip generation: The system prepares an order for fulfillment when you create or change an order by creating records in the Pick Control Header and Pick Control Detail tables and defining whether the records require authorization. Preparing the order for pick slip generation in advance reduces the time it takes to run [Streamlined Pick Slip Generation \(WSPS\)](#) to fulfill and print the picking documents. See [Preparing Orders for Pick Slip Generation](#) for an overview and processing details.

Pick slip generation performs the following steps.

#	Step
1.	Select Pre-Generated Picks for Pick Slip Generation The system determines which pre-generated picks to include in the pick slip generation run, based on the pick slip selection criteria specified on the Streamlined Pick Slip Generation Screen. To be eligible for pick slip generation, an order cannot be locked by some other process, such as order maintenance. Pre-generated picks are picks created during pick slip preparation prior to running pick slip generation for an order. The status of a pre-generated pick is either G Generated No Authorization, indicating the pick requires authorization during pick slip generation, or H Generated Has Authorization, indicating the pick can bypass authorization during pick slip generation. See Creating Pre-Generated Picks. When the system selects a pre-generated pick to include in the pick slip generation run, the system changes the <i>Pick status</i> from G Generated No Authorization to 1 Waiting for Authorization or H Generated Has Authorization to 2 Authorized. See Selecting Pre-Generated Picks for Pick Slip Generation.
2.	Perform Card Authorizations The system performs batch authorization processing for picks in the Pick Control Header table that are in a 1 Waiting for Authorization status. The system sends the authorization request for the shippable amount on the pick. If a credit card or stored value card type payment method that requires authorization does not receive an approved authorization, the system does not generate the pick slip. See Authorizations During Pick Slip Generation.

#	Step
3.	Allocate Stock from a Warehouse Location The system determines which item/locations to reserve stock from in order to fulfill the quantity required for the pick. See Allocating Stock. If the Let Down Replenishment (C36) system control value is set to REPORT or RPT/EXEC, the system determines if a primary location needs to be replenished. See Let Down Replenishment. If an item cannot be picked due to allocation errors, the system prints the item on the Item Stock Allocation Error Report. The Withhold Picks due to Item Allocation Error (F04) system control value defines whether the system prints a pick slip for an order when an item on the order creates a stock allocation error. Once the system determines the location(s) from where to allocate stock for pick slip generation, the system creates the associated records in the Pick Location table.
4.	Sort the Pick Slips The system uses the Pick Sort GH table to sort the pick slips so that they generate and print in the correct order. The sort also determines when the system creates a new pick slip PDF document for the pick slips in the pick slip generation run. See Sorting Pick Slips into Separate PDF Documents and Pick Slip Sort within a Pick Slip PDF Document.  Note: Streamlined pick slip generation does not sort pick slips if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected. If the Use Cart/Bin Picking? (B38) system control value is selected, the system: • Groups items together for picking by determining the total number of items that can fit on a single picking cart. • Generates a Cart/Bin Batch Picking Pullsheet for each cart, and a Cart Batch Recap for the pick slip run. • Sorts and groups orders by batch number. See Using Cart/Bin Picking, Sorting Pick Slips into Separate Cart Batches, and Pick Slip Sort Within a Cart Batch.
5.	Print the Picking Documents The system groups the pick slips into documents for printing. • You can review the Pick Slip on the Forms Management Screen. • You can review pick slip reports for the pick slip generation run on the Document Management Screen. Bypass printable picks: Streamlined pick slip generation does not generate printable pick slips if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected. See Generating and Printing Pick Slips and Available Pick Slip Generation Documents.

Picks not included? If you run pick slip generation and the system does not include the picks you were expecting, you can use [Pick Print Eligibility \(WPPE\)](#) to determine the reason why the picks for an order were not included.

Pick Slip Generation Setup Requirements

- [Pick Slip Selection Criteria](#)

- [Scheduling Pick Slip Generation](#)
- [Freeze Evaluation in Pick Slip Generation](#)
- [Pick Slip Form Setup Requirements](#)
- [Images on Pick Slips](#)
- [Number Assignment Values](#)
- [Warehouse Management Settings for Pick Slip Generation](#)
- [System Control Values That Apply to Pick Slip Generation](#)
- [Property Related to Pick Slip Generation](#)

Pick Slip Selection Criteria

Select the [Streamlined Pick Slip Generation \(WSPS\)](#) menu option to define the pick slip selection criteria that the system uses to generate pick slips. Once you create a pick slip generation template, you can use it to define your criteria, submit the pick slip generation process, and print the pick slip documents.

Scheduling Pick Slip Generation

You can schedule when pick slip generation runs for a particular pick slip generation template using a periodic function whose *Program name* is PFR0107 and whose *Parameter* matches the pick slip generation template's *Description*.

To set up:

#	Step
1.	Use Streamlined Pick Slip Generation (WSPS) to create a pick slip generation template. The system automatically creates a periodic function for the pick slip generation template if you select the <i>Create Periodic Function</i> flag and the template's <i>Description</i> is 7 characters or less. NOTE: The <i>Description</i> must be 7 characters or less because the maximum length for the periodic function name is 7 positions. Also, in order to create a periodic function for the template, the description cannot contain a single quote ('). Example: To run pick slip generation by selected order number, create a pick slip generation template with a description of ORDER # and select the <i>Create Periodic Function</i> flag. The system creates the periodic function with the following settings: • Function = the text you entered in the <i>Description</i> field for the pick slip generation template. • Description = the text you entered in the <i>Description</i> field for the pick slip generation template; however, you can change it. • Company parameter = selected • Appl area (Application area code) = FUL Fulfillment • Program name = PFR0107 • Parameter = the text you entered in the <i>Description</i> field for the pick slip generation template. The parameter must match the <i>Description</i> defined for the pick slip generation template. For example, if the description of the pick slip generation template is ORDER #, the parameter must also be ORDER # and not ORDER#. NOTE: You can also use Working with Periodic Functions (WPER) to manually create the periodic function. In this situation, the program name must be PFR0107 and the <i>Parameter</i> must match the <i>Description</i> of the pick slip generation template.

#	Step
2.	Use Working with Periodic Processes (WPPR) to assign the periodic function to a periodic process. - To run a separate schedule for each pick slip generation template, create a separate periodic process for each periodic function that represents a pick slip generation template. - If you plan to run your pick slip generation templates on the same schedule, you can create one periodic process for all periodic functions that represent a pick slip generation template. When the periodic process is executed, the system processes the periodic functions in assigned sequence order.
3.	Once you have created the periodic process, you can use the Execute Periodic Process screen (located in the Working with Periodic Processes (WPPR) or Executing Periodic Processes (EPRO) menu option) to define a schedule for the job. See How to Schedule a Job for instructions.

Freeze Evaluation in Pick Slip Generation

Pick slip generation evaluates the status of the [Reservation freeze](#) field for an item warehouse, the [Reservation freeze](#) flag for an item location, and the [Frz \(Freeze\)](#) field for a warehouse location. If there is a freeze at any level, pick slips do not print. Instead, the system prints the [Item Stock Allocation Error Report](#) listing the items that were ordered but not picked and the reason why the inventory was not picked.

Pick Slip Form Setup Requirements

See [Forms Setup](#) for more information on the setup required for the pick slip form. This setup includes:

- [Specify the Maximum Number of Pick Slips Per Spool File](#)
- [Set up Related System Control Values](#)
- [Create Image Files for Company or Entity Logos \(Graphical Forms\)](#)
- [Forms Properties](#)

Images on Pick Slips

You can include a company or entity logo on the printed pick slip. See [Setting Up Company Logos for Forms](#) for more information.

Important:

Company and entity logos on forms is not currently implemented.

Number Assignment Values

Use the [Setting Up the Number Assignment Table \(WNUM\)](#) menu option to set up the following number assignment values.

Number Assignment	Description	End #
PCH Billing Batch # (A13)	Assigns the next number to a batch of pick slips so that you may bill all pick slips in the batch in a single step.	7 positions

Number Assignment	Description	End #
PCH Control # (A15)	Assigns the next number to uniquely identify each pick.	7 positions
Cart Batch # (A26)	Assigns the next number to a cart to be used for cart/bin picking.	3 positions

Warehouse Management Settings for Pick Slip Generation

If you are using a warehouse management system and do not need to generate pick slip documents, use streamlined pick slip generation and select the *Bypass Creation of Pick Forms during WSPS Pick Generation (K55)* to improve pick slip performance.

System Control Values That Apply to Pick Slip Generation

- [System Control Values Related to Drop Ship Pick Slips](#)
- [System Control Values Related to Pick Slip Allocation](#)
- [System Control Values Related to Let Down Replenishment](#)
- [System Control Values Related to Pick Slip Sort](#)
- [System Control Values Related to Cart/Bin Picking](#)
- [System Control Values Related to Printing Pick Slips](#)

System Control Values Related to Drop Ship Pick Slips

See [Drop Ship Pick Slips](#) for more information about each system control value.

System Control Value	Description
Print Amounts on Drop Ship Picks (C81)	Defines whether to print prices on drop ship pick slips.
Allow Only Single Line on Drop Ship Pick (C82)	Defines whether a single item or multiple items print on a drop ship pick slip.
Authorize Only Merchandise for Drop Ship (C92)	Defines how to authorize charges for drop ship picks.
Print One Drop Ship Invoice per Ship Alone Item (E38)	Defines whether the system prints a separate drop ship invoice for each ship alone item on an order.
Drop Ship Pick Print Program (E92)	Defines the program that prints drop ship pick slips.
Add Printed Drop Ship Lines as Backordered on Pick (E93)	Defines whether the system displays drop ship items as backordered on the regular pick slip even after a drop ship pick slip or purchase order has been generated for the drop ship item.

System Control Values Related to Pick Slip Allocation

See [Allocating Stock](#) for more information about each system control value.

System Control Value	Description
Inventory Sharing (A69)	Defines whether a company will fulfill orders from another company's inventory.
Check Location Quantities During Pick Generation (C54)	Indicates whether pick slip generation allocates inventory from specific pickable locations in the warehouse.

System Control Value	Description
Include Bulk Locations in Primary Primary Availability (F87)	Defines whether the system includes the quantity in bulk locations in the available pick quantity for the primary primary location.
Include Secondary Locations in Primary Primary Availability (F88)	Defines whether the system includes the quantity in secondary locations in the available pick quantity for the primary primary location.
Withhold Picks due to Item Allocation Error (F04)	Defines whether the system prints a pick slip for an order when an item on the order creates a stock allocation error.

System Control Values Related to Let Down Replenishment

See [Let Down Replenishment](#) for more information about each system control value.

System Control Value	Description
Let Down Replenishment (C36)	Determines whether to use let down replenishment during pick slip generation.
Replenish from Location Type (A66)	Defines the types of locations from which you want to replenish stock when performing primary location replenishment.
Include Print Quantity in Available Calculations (A65)	Defines whether you want to include the print quantity in primary replenishment calculations.
Check Location Quantities During Pick Generation (C54)	Indicates whether pick slip generation allocates inventory from specific pickable locations in the warehouse.
Consolidated Replenishment Report Program Name (G49)	Determines whether you can print the consolidated replenishment detail reports for replenishment control requests created by multiple pick slip generations in a single day.

System Control Values Related to Pick Slip Sort

See [Sorting Pick Slips into Separate PDF Documents](#) for more information about each system control value.

System Control Value	Description
Pick Sort Program Name (C65)	Identifies the program that sorts data for pick slips in pick slip generation.
Sort Pick Slips by Gift Flag (D53)	Defines whether the system separates gift orders from non-gift orders when sorting pick slips.
Sort Picks by Foreign/Domestic Flag (D54)	Defines whether the system separates foreign from domestic addresses when sorting pick slips.
Sort Picks by Pick Sequence (E89)	Defines whether the system considers the pick sequence number defined in DCreating and Maintaining Locations (WLOC) when sorting pick slips in a batch.
Load Location into Pick Sequence (G34)	Indicates whether to load the location code(s) for each pick slip into the <i>Picking sequence array</i> field of the Pick Control Header Extended and Pick Sort GH tables when you generate pick slips, so that you can use this information for your pick sort program.

System Control Values Related to Cart/Bin Picking

See [Using Cart/Bin Picking](#) for more information about each system control value.

System Control Value	Description
Use Cart/Bin Picking? (B38)	Defines whether to use the cart/bin picking feature to sort pick slips.
Maximum Number of Single Line Picks (B39)	Defines the maximum number of single line pick slips to include in a single batch.
Maximum Number of Multi Line Picks (B40)	Defines the maximum number of multi-line pick slips to include in each batch.
Maximum Number of Zones (B41)	Defines the maximum number of zones (up to six) allowed on a multi-line pick slip before generating another batch.
Cube of Cart (B42)	Defines the total cubic volume of the cart.
Cube of Bin (B44)	Defines the cubic volume of the smallest bin within a cart.
Minimum Number of Picks in a Cart (B47)	Defines the minimum number of picks that can fit in a cart.
Break Single Line Picks by Zone (E33)	Defines whether to break single line pick slips into separate cart/bin batches based on the warehouse zone.
Sort Picks by Pick Sequence (E89)	Defines whether the system considers the pick sequence number defined in Creating and Maintaining Locations (WLOC) when sorting pick slips in a batch.

System Control Values Related to Printing Pick Slips

See [Generating and Printing Pick Slips](#) for more information about each system control value.

System Control Value	Description
Generate Invoice Number at Pick Gen (H80) and Generate Invoice # at Pick Gen without Address Match (K81)	Define whether to assign pending invoice numbers to qualifying orders at pick slip generation.
Pick Printing Program (C37)	Defines the name of the program that prints pick slips.
Batch Pull Sheet Printing Program (C38)	Defines the name of the program that prints batch pull sheets.
Cart/Bin Batch Pull Sheet Printing Program (C39)	Defines the name of the program to print batch pull sheets for cart/bin picking.
Print Batch Pull Sheet Item Summary (C59)	Defines whether to print the Batch Pull Sheet Item Summary report when printing pick slips.
Automatic Generation of Gift Acknowledgement (B92)	Defines whether the system will print gift acknowledgements for Gift orders (The <i>Gift</i> field on the order header is selected) when you generate pick slips, when you bill the orders, or not at all.
Batch Item Pull Label Printing Program (F63)	Defines the program name to print batch item pull labels.
Bypass Creation of Pick Forms during WSPS Pick Generation (K55)	Indicates whether to bypass generation of printable pick slip and other documents in order to accelerate streamlined pick slip generation.

Property Related to Pick Slip Generation

Checking for authorizations: The [CHECK_AUTHS_IN_PICKS](#) property controls whether you can generate pick slips if generate pick slips when records exist for your company in the CC Authorization Transaction table. See this property for more information.

Drop Ship Pick Slips

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

System control values related to drop ship pick slips:

System Control Value	Description
Print Amounts on Drop Ship Picks (C81)	Defines whether to print prices on drop ship pick slips.
Allow Only Single Line on Drop Ship Pick (C82)	Defines whether a single item or multiple items print on a drop ship pick slip.
Authorize Only Merchandise for Drop Ship (C92)	Determines the amount to authorize for drop ship purchase order and drop ship pick slips.
Print One Drop Ship Invoice per Ship Alone Item (E38)	Defines whether the system prints a separate drop ship invoice for each ship alone item on an order.
Drop Ship Pick Print Program (E92)	Defines the program that prints drop ship pick slips.
Add Printed Drop Ship Lines as Backordered on Pick (E93)	Defines whether the system displays drop ship items as backordered on the regular pick slip even after a drop ship pick slip or purchase order was generated for the drop ship item.

Order Orchestration Drop Ship system control values: See [Drop Ship Integration Values \(H20\)](#) for a list of the system control values related to the [Order Orchestration Drop Ship Integration](#).

DROPSHIP Authorization Records in W Status

The system creates a record in the Drop Ship Work table when you process drop ship orders. The record remains in the Drop Ship Work table until the corresponding authorization transaction in the CC Authorization Transaction table receives an approved authorization. The drop ship output (pick slip or purchase order) is not produced until the credit card on the order receives an approved authorization.

When you select to generate pick slips, if a drop ship work record exists for a drop ship order paid with a credit card and the credit card did not receive an approved authorization during drop ship processing due to transmission failure, a pop-up window opens.

When you see this pop-up window during pick slip generation, you can either:

- select Accept to generate pick slips without first re-sending the drop ship order for authorization.

When you generate pick slips, the system sends all authorization records in the CC Authorization Transaction table to the authorization service, including the authorization transaction associated with the drop ship order. If you do this, a record remains in the Drop Ship Work table for the drop ship order, but the corresponding authorization record no longer exists in the CC Authorization Transaction table.

To generate drop ship output for the drop ship order, you need to delete the record from the Drop Ship Work table and process drop ship orders again.

 Note:

When you process drop ship orders again, the system sends an authorization transaction to the authorization service for the drop ship order that was stranded in the Drop Ship Work table. You need to make sure that you do not receive a double authorization for the drop ship order since the authorization transaction associated with the drop ship order was sent to the authorization service when you ran pick slip generation.

 Note:

You continue to receive this pop-up window when you generate pick slips until you delete the record in the Drop Ship Work table.

- select Reject to return to the *Work with Streamlined Pick Slip Generation Screen* without generating pick slips. You can verify with the authorization service whether the drop ship authorization was received.
 - If the authorization was received by the authorization service, use the [Reprocess Drop Ship Authorizations Screen \(RPDS\)](#) to receive the authorization. If the drop ship order receives an approved authorization, the system generates the drop ship output (pick slip or purchase order) and deletes the record from the Drop Ship Work table.
 - If the authorization was not received by the authorization service, check the CC Authorization Transaction table to verify that only the authorization transaction for the drop ship order exists. Then, use the [Reprocess Drop Ship Authorizations Screen \(RPDS\)](#) to resend the drop ship authorization transaction. If the drop ship order receives an approved authorization, the system generates the drop ship output (pick slip or purchase order) and deletes the record from the Drop Ship Work table and CC Authorization Transaction table.

 Note:

If authorization transactions exist in the CC Authorization Transaction table for non-drop ship orders, the system sends the authorization transactions to the authorization service when you reprocess drop ship authorizations.

Screen Option	Procedure
Continue to generate pick slips without correcting the drop ship error	Select Accept. The system sends all records in the CC Authorization Transaction table to the Authorization Service, including the authorization associated with the drop ship order.
Return to Work with Pick Slip Generation without generating pick slips	Select Reject. The system returns you to the <i>Work with Streamlined Pick Slip Generation Screen</i> allowing you to correct the drop ship error before generating pick slips.

For more information: See [Selecting Vendors for Drop Ship Processing \(MDSP\)](#) for more information on processing drop ship orders.

Selecting Pre-Generated Picks for Pick Slip Generation

The system determines which pre-generated picks (picks in the Pick Control Header table whose status is either G Generated No Authorization or H Generated Has Authorization) to include in the pick slip generation run, based on the pick slip selection criteria specified on the *Streamlined Pick Slip Generation Screen*. To be eligible for pick slip generation, an order cannot be locked by some other process, such as order maintenance.

During pick selection, the system also:

- Assigns a billing batch number to the pick.
- Updates the *Date* and *Time Updated* in the Pick Control Header table to the current date and time.
- Updates the *Date* and *Time Printed* in the Pick Control Header table to the current date and time.
- Looks at Authorization History to determine if any picks in an H Generated Has Authorization status are associated with an expired authorization or credit card authorization reversal. If so, the system updates the status of the Authorization History record to E Expired and changes the status of the pick to G Generated No Authorization.
- Looks at Authorization History to determine if any picks in an H Generated Has Authorization status are associated with a stored value card payment and the [Perform Balance Inquiry during Batch Authorizations \(J19\)](#) system control value is selected. If so, the system changes the status of the pick to G Generated No Authorization.
- Looks at the Online Authorization table to determine if any picks are associated with an online authorization in an S Sent status for a deactivated pay type. In this situation, the system ignores the online authorization, and if another credit card type payment method is on the order, the pick goes out for authorization for the new payment method.
- Changes the *Pick status* from G Generated No Authorization to 1 Waiting for Authorization or H Generated Has Authorization to 2 Authorized. The system performs authorization during pick slip generation for picks that are in a 1 Waiting for Authorization status; see [Authorizations During Pick Slip Generation](#).

Submitting ship-for-pickup orders to Order Orchestration: If an order selected for pick slip generation is flagged to ship to a store location for customer pickup, the process sends a Submit Order request to Order Orchestration. See [Ship-for-Pickup Orders](#) for an overview.

Checking status for retail pickup or delivery orders: If a retail pickup or delivery order from Order Orchestration is selected for pick slip generation, the process sends a status inquiry or status list request to Order Orchestration to confirm that the order has not been canceled since the last update on its status was received, or that it is not currently under review. See [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for an overview, and see [Use OROB Status Inquiry List Web Service \(M05\)](#) for details.

Authorizations During Pick Slip Generation

Purpose: The system performs batch authorization processing during pick slip generation for picks that are in a 1 Waiting for Authorization status in the Pick Control Header table.

Includes drop ship or brokered items? If the order includes a drop ship or brokered order line as well as a backordered line, as well as any pickable lines:

- If none of the lines have been authorized, the system obtains an authorization for all order lines.
- If the drop ship or brokered lines have been authorized, the system obtains an authorization only for the backordered or pickable lines.

Picks that skip the authorization process: The system skips the authorization process for picks in the Pick Control Header table that are in a 2 Post-Authorization status. For these picks, the system continues with regular pick slip generation; see [Allocating Stock](#).

Also, the system does not authorize pick slips for ship-for-pickup orders if the [Payment at POS for Ship for Pickup Orders \(L60\)](#) system control value is selected. See that system control value for background.

Automatic authorization: You can approve all authorizations for a service bureau automatically if you want to avoid waiting for the response.

This option is available if all of the following are true:

- The [Default Vendor Response for Automatic Authorizations \(G10\)](#) system control value provides a valid response code for the service bureau,
- The [Immediate response](#) field for the service bureau is unselected, and
- The user has the required authority, as controlled by the [Continue Authorization without Receipt \(A90\)](#) secured feature.

You might choose automatic authorization if you expect a substantial delay before you receive the response from the service bureau, you want to approve and print pick slips quickly, and the possibility of the orders failing authorization is slight.

Determining the Amount to Authorize

The system sends the dollar amount associated with what is shippable on the order that has not yet received an authorization, across all ship to customers, for authorization.

- If the card is the only payment method, the shippable dollar amount includes:
 - shippable merchandise amount, excluding drop ship items.
 - tax associated with the shippable merchandise amount.
 - total freight
 - total additional freight
 - total order level additional charges



Note:

The system sends the total freight and total additional freight for authorization, regardless of whether you are prorating freight charges (the [Prorate Freight Charges \(D39\)](#) system control value is selected).

- If the card is the catch-all payment method, the amount to authorize is the remaining shippable dollar amount not associated with another payment method on the order. The system subtracts the amount applied to any other payment methods from the shippable dollar amount.

shippable dollar amount - dollar amount associated with other payment methods =
amount to authorize for this card

If more than one card is sent for authorization: The system sends for authorization the card defined with a dollar amount, and then sends the catch-all card for authorization.

Example: If you specify that \$50.00 is to be charged to Visa and the remainder of the order is to be charged to Mastercard, the first \$50.00 will be applied to Visa. The system authorizes only the amount that can be shipped. If only \$40.00 is being shipped, an authorization request

for \$40.00 will be sent for the Visa card. If an additional \$40.00 is shipped the following week, two authorizations will be requested: the remaining \$10.00 for Visa and \$30.00 for Mastercard. If the Visa card is approved and the Mastercard is declined, the second shipment will not occur. The full shipment amount must be approved for the shipment to occur. The system will keep the authorization code, date and amount for the Visa card. The authorization will be good for the number of days you specify in the *Reauthorization days* field in the Payment Type table.

Deferred and installment pay plans: If the [Auth full amount \(Authorize full amount\)](#) field for the Flexible Payment Option is selected, the full pickable amount is sent for authorization. If this field is unselected, and:

- The order includes an installment payment plan, the first installment amount for the pickable merchandise is sent for authorization.
- The order includes a deferred payment plan, \$1.00 is sent for authorization.

**Note:**

If the *Authorize full pickable amount* field is selected, the system submits the full amount of the pick slip for authorization, even though this amount is not deposited immediately.

Credit cards requiring authorizations less than \$1.00: If the credit card amount to authorize is less than \$1.00 and you have defined an authorization number in the [Authorization Number for Authorizations Under \\$1.00 \(I08\)](#) system control value, the system does not send the credit card to the service bureau for authorization and instead assigns the authorization number defined in the system control value to the credit card. If an authorization number is not defined in this system control value, the system sends the credit card to the service bureau for authorization, regardless of the amount that requires authorization.

If the order includes drop ship items: The system does not include any drop ship items in the amount requiring authorization for pick slip generation. However, when you use [Selecting Vendors for Drop Ship Processing \(MDSP\)](#), the system includes all items when determining the amount for the authorization request.

If a new authorization is required and an authorization for a previous shipment has expired: If there is an expired authorization for a previously generated pick slip, and a new authorization is required for the pick slip that is now being generated, the system authorizes the amount for the new pick slip, excluding the amount for previously generated pick slip. In this case, the amount of the expired authorization is authorized while the full amount is deposited through [Processing Auto Deposits \(SDEP\)](#).

Example: Item 1 on an order was authorized for 10.00 and the pick slip generated, but the authorization has since expired. A pick slip is now generated for item 2 for 15.00, and the amount authorized at this time is 15.00. During deposit processing, the 10.00 is authorized, and 25.00 is deposited.

Sending Authorization Requests to the Authorization Service

When you send a batch authorization request to the authorization service, the system:

- Creates a record in the CC Authorization Transaction table.
- Places the pick slip in a pending status.
- Sends the authorization request to the service bureau and waits for a response. If an authorization response is not received, the system continues with pick slip generation processing and does not generate a pick slip for the order that did not receive an

authorization. The Pick Control Header and Pick Control Detail records for the pick slip requiring authorization will remain in a pending status.

Authorizations When Consolidating Invoices

The [Consolidated Invoice \(B49\)](#) system control value indicates whether to consolidate invoices for shipments on the same order on the same date. The setting of this system control value also determines whether the system sends a separate authorization request for each pick slip generated for an order.

If the *Consolidated Invoice* system control value is selected, the system consolidates order shipments that occur on the same date into a single invoice. The setting of the [Invoice Consolidation Method \(E29\)](#) system control value determines whether the system consolidates all order shipments (across ship tos) that occur on the same date into a single invoice, or whether the system consolidates all order ship to shipments (single ship to) that occur on the same date into a single invoice.

In this situation, the system will obtain one authorization (for all order shipments or for each order ship to shipment) and will create one deposit record for the total amount being shipped, regardless of the number of pick slips that are generated for the order. The full amount of the shipment must be authorized when this method is used. If the authorization is declined, the system does not generate any pick slips for the order.

Consolidating invoices allows you to limit the number of authorization and deposit transactions required for the order, and reduces your transaction fees to the service bureau.

- If all pick slips for the order are billed on the same day, the authorization amount will match the deposit amount and no more authorizations will be required for settlement.
- If all pick slips for the order are not billed on the same day, the authorization amount will not match the deposit amount and the order will be re-authorized at settlement with each deposit.

Example: Order # 745 has a shipment amount of \$100.00. The system generates 3 pick slips for the order, each with an authorization amount of \$100.00.

Pick Slip	Shipment Amount
1	\$25.00
2	\$40.00
3	\$35.00

One authorization will be obtained for the entire order. If the customer has an available balance of only \$30.00, nothing will be shipped. All 3 pick slips associated with the order will be deleted from the Pick Control tables.

! Important:

In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date.

If the *Consolidated Invoice* system control value is unselected, the system produces a separate invoice for each pick slip generated, regardless of when they ship (bill). In this

situation, the system sends a separate authorization for each pick slip associated with the order.

Example: Order # 746 has a shipment amount of \$100.00. The system generates 3 pick slips for the order.

Pick Slip	Shipment Amount	Authorization Amount
1	\$25.00	\$25.00
2	\$40.00	\$40.00
3	\$35.00	\$35.00

A separate authorization will be obtained for each pick slip associated with the order. If the customer has an available balance of only \$30.00, pick slip 1 will ship, but pick slips 2 and 3 will not ship.

See [Consolidated Invoice \(B49\)](#) and [Invoice Consolidation Method \(E29\)](#) for more information.

Receiving a Response from the Authorization Service

When an authorization response is received, the system:

- Updates the Credit Card Authorization Transaction table with the values in the authorization response message.
- Updates the Authorization History table.
- Continues with pick slip generation.

If the authorization is declined: The system:

- Does not generate a pick slip for the order.
- Deletes the Pick Control Header and Pick Control Detail records since the items cannot ship.
- Prints the order on the [Credit Card Authorization Listing](#) for authorizations that have been declined.
- Updates the record in the Authorization History table indicating the card was declined. You can review the declined authorization on the [Display Authorization History Screen](#) and [Authorization History Details Window](#) in standard Order Inquiry.
- If the [Credit Card Decline Email Program \(K53\)](#) system control value specifies a valid email program, the pick slip generation program generates an email to customers whose orders are placed on hold due to credit card decline. See that system control value for more information.

If the authorization is approved: The system:

- Generates a pick slip for the order.
- Prints the order on the [Credit Card Authorization Listing](#) for authorizations that have been approved.
- Updates the status of the record in the Authorization table to *RCVD.
- Updates the record in the Authorization History table indicating the card has been approved, the authorization number, the date the card was authorized, and the dollar amount authorized. You can review the approved authorization on the [Display Authorization History Screen](#) and [Authorization History Details Window](#) in standard Order Inquiry.

AVS response: If the credit card charge is approved (authorized) but the credit card fails the address verification check, the authorization may be placed on hold (based on the value in the *Hold reason* field in the Vendor Response table). The order header is also placed on AT (declined credit card) hold. You must contact the customer and obtain correct address information, then take the order header and credit card pay type off of hold through the Selecting Held Orders menu option and resend for authorization or cancel the order. A pick slip is not generated until the credit card receives an approved authorization and passes AVS verification. See [Manage Held Orders](#) in Modern View online help.

Voiding pick slips: If you void a pick slip, the credit card is still authorized. The authorization does not expire until the number of days you specify in the *Reauthorization days* field in the Payment Type table have elapsed. If the authorization is valid when the order is re-submitted for pick slip generation, the system will use the existing authorization. The authorization amount may not match the shipment amount when the deposit request is processed. If this occurs, the service bureau may reauthorize the order for the correct amount prior to accepting the deposit.

Deposits: Authorization numbers and authorization amounts should match the deposits. The system pulls the authorization numbers from the authorization history records for the order/ payment method to try to match the authorizations and deposits. See [Processing Auto Deposits \(SDEP\)](#).

Stored Value Card Balance Inquiry: If the [Perform Balance Inquiry during Batch Authorizations \(J19\)](#) system control value is selected, the system sends a stored value card balance inquiry request to the service bureau before performing batch authorization against the stored value card.

- If the remaining balance on the stored value card is equal to or greater than the amount to authorize, the system performs batch authorization against the stored value card.
- If the remaining balance on the stored value card is less than the amount to authorize, and:
 - The stored value card is the catch-all pay type on the order, the system does not perform batch authorization for the order and does not generate a pick slip for the order. Also, if a [Hold Reason for Stored Value Cards with Insufficient Funds \(J18\)](#) is defined, the system places the order on hold.
 - The stored value card is not the catch-all pay type on the order, the system performs batch authorization for the order to authorize the stored value card pay type for the remaining balance and the catch-all pay type for the remaining authorization amount.

See [Batch Authorization Balance Inquiry](#) for more information.

Allocating Stock

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

The system calls pick slip allocation after authorization processing. The system deletes any pick slips that failed authorization before performing pick slip allocation.

Pick Location Types

As the system searches for locations in pick slip generation, it tries to allocate only from locations defined as pickable. The following warehouse location types exist.

Location Type	Description
Primary	Primary locations are the main picking locations, although a primary location may be defined as pickable or non-pickable. These locations may contain more than one item/SKU. Pickable primary locations are filled during replenishment from other locations, based on the setting of the Replenish from Location Type (A66) system control value. Item/location records have min/max values used in the replenishment. Non-reservable primary locations are excluded from the replenishment system. Item/location records in a primary location are never deleted by the system.
Secondary	Secondary locations may be pickable or non-pickable, and they can contain more than one item/SKU. Pickable secondary locations can be replenished from other locations, based on the setting of the Replenish from Location Type (A66) system control value. Item/location records associated with these locations are never deleted by the system. Pickable and non-pickable secondary locations are used to replenish primary locations. Non-reservable locations are excluded from the replenishment system.
Bulk	Bulk locations are used to store overstock quantities. They usually contain case or carton quantities, can be defined as pickable or non-pickable, and can contain more than one item/SKU. Quantities stored in bulk locations are used to replenish primary or secondary locations. Item/location records associated with bulk locations are deleted by the system when the on-hand in that location reaches zero. Non-reservable locations are excluded from the replenishment system.
Temporary	Temporary locations are assigned by the system or an operator to temporarily store inventory until it can be put away or picked. A temporary location cannot exist without at least one item/location record associated with it. When stock is moved into a temporary location, the system creates an item/location record. When the on-hand in the item/location reaches zero, the system deletes the location and the item/location records. Order Administration does not allocate merchandise from a temporary location even if the location is defined as pickable. In order to allocate stock, you must move the merchandise to a non-temporary, pickable location.

Pick Slip Allocation Processing

The system performs the following steps during pick slip allocation.

- [Determining the Type of Pick Slip Generated](#)
- [Determining the Inventory Sharing Setting](#)
- [Populating the Picking Sequence Array Field in the Pick Sort GH table](#)
- [Determining the Pick Detail Quantity](#)
- [Determining the Weight and Cube of the Pick Slip](#)
- [Determining Whether to Check Location Quantities during Allocation](#)
 - [Allocation Processing Against Multiple Locations](#)
 - [Allocation Processing Against Primary Primary Location](#)
- [Determining the Shipper for the Pick Slip](#)

- [Determining Whether to Hold Pick Slips Due to Allocation Errors](#)
- [Performing Updates After Successful Allocation](#)

Inventory transactions: In order to allocate stock without errors, you should not process inventory transactions while running pick slip generation.

Inventoried item? The system performs allocation processing for inventoried items only (the *Non-inventory* field for the item is unselected and the *Affect inventory* field for the Pick Control Detail record is set to Y).

Streamlined allocation? If the [Use Streamlined Allocation \(L63\)](#) system control value is selected, the system allocates the entire quantity printed (and reserved) on the pick slips from the item's primary primary location in the warehouse on the Pick Control Header and bypasses certain allocation processing to accelerate pick slip generation. You might use streamlined allocation if you integrate with a warehouse management system. See [Streamlined Allocation](#) for processing details.

Determining the Type of Pick Slip Generated

The system looks at the records in the Pick Control Header table to determine if the *Generation type* is R (Regular), S (Special Handling), or I (Bill Immediately).

- If the *Generation type* for the record in the Pick Control Header table is R (Regular) or S (Special Handling), the system continues with allocation processing.
- If the *Generation type* for the record in the Pick Control Header table is I (Bill Immediately), the system confirms and immediately bills the pick slip. See [Confirming and Billing the Pick Slip Immediately](#).

Determining the Inventory Sharing Setting

The system looks at the setting of the Inventory Sharing (A69) system control value. This system control value defines whether a company will fulfill orders from another company's inventory.



Note:

The system does not perform this step if you [Use Streamlined Allocation \(L63\)](#).

- If selected, the company where you ran pick slip generation fulfills orders from another company's inventory. The *Shared company/warehouse* in the [Creating and Maintaining Warehouses \(WWHS\)](#) menu option indicates the company and warehouse that provides the inventory to fulfill orders against the company where you ran pick slip generation.
- If unselected, the company where you ran pick slip generation fulfills orders from its on-hand inventory.

See [Inventory Sharing \(A69\)](#) for more information about this system control value.

Populating the Picking Sequence Array Field in the Pick Sort GH table

The system looks at the following system control values to determine whether the system loads the location code or location picking sequence number into the *Picking sequence array* field in the Pick Control Header Extended table and Pick Sort GH table when you generate pick slips.

**Note:**

The system does not perform this step if you [Use Streamlined Allocation \(L63\)](#).

The system uses the *Picking sequence array* field to sort pick slips into separate PDF documents and during cart/bin picking. See [Sorting Pick Slips into Separate PDF Documents](#) and [Sorting Pick Slips into Separate Cart Batches](#).

Sort Picks by Pick Sequence (E89)	Load Location into Pick Sequence (G34)	Results:
unselected	unselected or selected	The system leaves the <i>Picking sequence array</i> field in the Pick Control Header Extended and Pick Sort GH tables blank.
selected	selected	The system loads the <i>Picking sequence array</i> field in the Pick Control Header Extended and Pick Sort GH tables with the location code.
selected	unselected	The system loads the <i>Picking sequence array</i> field in the Pick Control Header Extended and Pick Sort GH tables with the location picking sequence number.

See [Sort Picks by Pick Sequence \(E89\)](#) and [Load Location into Pick Sequence \(G34\)](#) for more information about each system control value.

Determining the Pick Detail Quantity

The system uses the following calculation to determine the quantity required to fulfill a pick slip detail record.

Qty Ordered in Pick Control Detail - Qty Backordered in Pick Control Detail = Quantity required for pick slip detail

Determining the Weight and Cube of the Pick Slip

The system determines the weight and cube of the pick slip.

**Note:**

The system does not perform this step if you [Use Streamlined Allocation \(L63\)](#).

Weight of pick calculation: If a *Ship weight* is defined for the SKU, the system uses the SKU *Ship weight*; otherwise, the system uses the item *Ship weight*:

SKU or Item Ship Weight * Quantity Printed on Pick Control Detail = Weight of pick in Pick Control Header Extended

The system rounds the weight of the pick slip to 3 decimal places, for example 9.999.

Example: The system generates a pick slip for the following items.

Item	Item Ship Weight	SKU Ship Weight	Pick Qty	Weight of Pick
ABC	1.234	3.111	2	2.468 + 3.111 +
BCD	3.111	4.25	1	4.25 = 9.829
CDE	4.0		1	

Cube of pick calculation: If a *Cube factor* is defined for the SKU, the system uses the SKU cube factor; otherwise, the system uses the item cube factor:

SKU or Item Cube factor * Quantity Printed on Pick Control Detail = Cube size of pick in Pick Control Header Extended

The system rounds the cube of the pick slip to the nearest integer.

Example: The system generates a pick slip for the following items.

Item	Item Cube Factor	SKU Cube Factor	Pick Qty	Cube Size of Pick
ABC	2.1	5.4	2	4.2 + 5.4 + 11.6 =
BCD	5.4	11.6	1	21 (rounded from
CDE	11.0		1	21.2)

The system uses the cube size of pick value during cart/bin picking; see [Using Cart/Bin Picking](#).

Determining Whether to Check Location Quantities during Allocation

The system looks at the setting of the [Check Location Quantities During Pick Generation \(C54\)](#) system control value to determine whether to allocate inventory from specific pickable locations in the warehouse.



Note:

The system ignores the setting of the *Check Location Quantities During Pick Generation (C54)* system control value if you *Use Streamlined Allocation (L63)*.

- If selected, the system allocates inventory from the first pickable location with enough stock to satisfy the quantity printed on the pick slip. If there is not enough stock, the system allocates inventory across multiple pickable locations, beginning with primary, secondary, then bulk locations. See [Allocation Processing Against Multiple Locations](#) for more processing information.
- If unselected, the system allocates the entire quantity printed on the pick slips from the item's primary primary location. If the primary primary location does not contain this quantity, you must perform replenishment immediately after running pick slip generation in order to replenish stock from bulk and secondary locations to the primary primary location. See [Allocation Processing Against Primary Primary Location](#).

**Note:**

If you are using [Let Down Replenishment](#) to generate and process replenishments during pick slip generation, you must select the [Check Location Quantities During Pick Generation \(C54\)](#) system control value.

Determining the Shipper for the Pick Slip

The system uses the following hierarchy to determine the ship via code to default to the [Pick Control Header Table](#). The system uses the ship via code in the Pick Control Header table as the shipper for the pick slip.

1. Use the ship via override defined for the pick slip generation template.
2. Use an alternate ship via defined for the ship via on the Order Header.
3. For single line pick slips, use the ship via defined on the Order Detail.
4. For multi line pick slips, use the ship via defined on the Order Header.

Streamlined allocation: If you *Use Streamlined Allocation (L63)*, the system overrides the ship via that defaults to the [Pick Control Header Table](#) only if a ship via override is defined for the pick slip generation template; the system does not override the ship via to the alternate ship via defined for the ship via on the order header.

Freight exempt items at the ship via level: When the system applies a ship via override to the pick slip, the system does not look at the Freight Exempt Item Ship Via table to determine if one or more of the items on the pick slip is excluded from freight for the ship via override. The system keeps the freight that was applied to the order during order entry and prints this freight amount on the pick slip. See [Working with Freight Exempt Items \(WFEI\)](#) for more information about freight exempt items.

Order history message: If the system applies a ship via override to the pick slip, the system writes an order history message indicating the new ship via code that was applied to the pick slip. For example: *PICK GEN SHIPPER CHANGED TO 03*.

**Note:**

The system does not write an order history message if you *Use Streamlined Allocation (L63)*.

1. Use the ship via override defined for the pick slip generation template.

If a ship via is defined in the *Override all orders to via* field for the pick slip generation template, and this ship via passes [Ship Via Override Validation during Pick Slip Generation](#), the system updates the *Ship via* field in the Pick Control Header record to the override ship via code.

Examples: The following ship via overrides exist in the Item Ship Via Override table for item ABC and ship via codes 1 and 2.

Example 1: You place an order for item ABC. The ship via code defined on the Order Header is ship via 1.

Ship via code 2 is defined as the *Override all orders to via* field for the pick slip generation template.

When you generate a pick slip for the order, the system updates the *Ship via* field in the Pick Control Header record to ship via code 2.

Example 2: You place an order for item ABC. The ship via code defined on the Order Header is ship via 1.

Ship via code 3 is defined as the *Override all orders to via* field for the pick slip generation template.

When you generate a pick slip for the order, the system updates the *Ship via* field in the Pick Control Header record to ship via code 1. The system does not apply the ship via defined in the *Override all orders to via* field for the pick slip generation template because that ship via is not a valid shipper for the item.

Example 3: You place an order for item ABC. The ship via code defined on the Order Header is ship via 1. The ship via code defined on the Order Detail is ship via 2.

Ship via code 3 is defined as the *Override all orders to via* field for the pick slip generation template.

When you generate a pick slip for the order, the system updates the *Ship via* field in the Pick Control Header record to ship via code 3. The system applies the ship via defined in the *Override all orders to via* field for the pick slip generation template because the system does not validate that the ship via is a valid shipper for the item when the ship via on the Order Detail does not match the ship via on the Order Header.

2. Use an alternate ship via defined for the ship via on the Order Header.

If the pick slip qualifies for an alternate ship via defined for the ship via on the order header, and this ship via code passes [Ship Via Override Validation during Pick Slip Generation](#), the system updates the *Ship via* field in the Pick Control Header record to the alternate ship via code.

You can define an alternate ship via code for a ship via on the [Create Ship Via \(2 of 2\) Screen](#). See this screen for more information on defining alternate shippers for a ship via code.



Note:

If the alternate ship via chosen for the order does not pass [Ship Via Override Validation during Pick Slip Generation](#), the system does not use this alternate ship via code for the Pick Control Header and does not reevaluate the other alternate ship vias defined for the ship via on the Order Header.

Alternate ship via hierarchy: The system uses the following hierarchy to determine which alternate ship via to use. Once the pick slip qualifies for one of the alternate ship vias, the system does not continue to determine if the pick slip qualifies for any of the other alternate ship vias.

- Use the first alternate ship via defined for the ship via on the Order Header.

The pick slip qualifies for the first alternate ship via if:

- The current date - the *Date shipped* defined in the Invoice Detail table for the first invoice for the order ship to is greater than the number defined in the [# of days since 1st shipment](#) field for the alternate ship via, Or
- The *# of shipments* defined in the Order Ship To table is greater than the number defined in the [# of shipments](#) field for the alternate ship via.

- Use the second alternate ship via defined for the ship via on the Order Header.
The pick slip qualifies for the second alternate ship via if:
 - The total **Ship wgt. (Shipping weight)** for the items on the pick slip is less than the **Minimum weight** field for the alternate ship via, *Or*
 - The *Total order amount* for the pick slip in the Pick Control Header table is less than the **Minimum value** field for the alternate ship via.
- Use the third alternate ship via defined for the ship via on the Order Header.
The pick slip qualifies for the third alternate ship via if:
 - The total **Ship wgt. (Shipping weight)** for the items on the pick slip is greater than the **Maximum weight** field for the alternate ship via, *Or*
 - The *Total order amount* for the pick slip in the Pick Control Header table is greater than the **Maximum value** field for the alternate ship via.

First alternate ship via examples: The first alternate ship via is defined for ship via 1:

Setting	Example
Alternate ship via 1	11
# of days since 1st shipment	7
# of shipments	2

Example # of days since 1st shipment: On 8/18, you generate a pick slip for the first shipment on the order. The system creates an invoice and updates the *Date shipped* field for the Invoice Detail record to 8/18. Since this is the first shipment for the order, the system does not use alternate ship via code 11 on the pick slip and instead uses the ship via code on the Order Header (ship via code 1).

On 8/26, you generate a pick slip for the second shipment on the order. The system uses the following calculation to determine the number of days since the first shipment: *current date - earliest date shipped = number of days since the first shipment*. In this example, the calculation is: 8/26 - 8/18 = 8 days. The number of days since the first shipment is greater than the number defined for the *# of days since 1st shipment* field for alternate ship via 1. The system updates the *Ship via* field in the Pick Control Header record to alternate ship via code 11.

Example # of shipments: On 8/23, you generate a pick slip for the first shipment on the order.

On 8/24, you generate a pick slip for the second shipment on the order. Since the number of shipments (2) is equal to the *# of shipments* field for alternate ship via 1, the system does not use alternate ship via code 11 on the pick slip and instead uses the ship via code on the Order Header (ship via code 1).

On 8/25, you generate a pick slip for the third shipment on the order. Since the number of shipments (3) is greater than the *# of shipments* field for alternate ship via 1, the system updates the *Ship via* field in the Pick Control Header record to alternate ship via code 11.

Second alternate ship via examples: The second alternate ship via is defined for ship via 1:

Setting	Example
Alternate ship via 2	12
Minimum weight	5
Minimum value	25.00

Example minimum weight: You place an order for item ABC for a quantity of 1 and item BCD for a quantity of 2. The ship via code on the Order Header is 1.

The *Shipping weight* defined for item ABC is 1.5. The *Shipping weight* for item BCD is .5. The total shipping weight for the order is 2.5 ($1.5 + .5 + .5 = 2.5$).

When you generate a pick slip for the order, because the total shipping weight for the items on the pick slip is less than the *Minimum weight* defined for alternate ship via 2, the system updates the *Ship via* field in the Pick Control Header record to alternate ship via code 12.

Example minimum value: You place an order for item ABC for a quantity of 5. The ship via code on the Order Header is 1.

The total order amount for the pick slip is \$18.30.

When you generate a pick slip for the order, because the pick slip total for the order is less than the *Minimum value* defined for alternate ship via 2, the system updates the *Ship via* field in the Pick Control Header record to alternate ship via code 12.

Third alternate ship via examples: The third alternate ship via is defined for ship via 1:

Setting	Example
Alternate ship via 3	13
Maximum weight	25
Maximum value	250.00

Example maximum weight: You place an order for item ABC for a quantity of 1 and item BCD for a quantity of 2. The ship via code on the Order Header is 1.

The *Shipping weight* defined for item ABC is 14.0. The *Shipping weight* for item BCD is 6.5. The total shipping weight for the order is 27.0 ($14.0 + 6.5 + 6.5 = 27.0$).

When you generate a pick slip for the order, because the total shipping weight for the items on the pick slip is greater than the *Maximum weight* defined for alternate ship via 3, the system updates the *Ship via* field in the Pick Control Header record to alternate ship via code 13.

Example maximum value: You place an order for item ABC. The ship via code on the Order Header is 1.

The total order amount for the pick slip is \$251.30.

When you generate a pick slip for the order, because the pick slip total for the order is greater than the *Maximum value* defined for alternate ship via 3, the system updates the *Ship via* field in the Pick Control Header record to alternate ship via code 13.

3. For single line pick slips, use the ship via defined on the Order Detail.

If the pick slip is for a single pick detail, the system updates the *Ship via* field in the Pick Control Header record to the ship via code defined on the Order Detail record.

If the ship via code on the Order Detail record is blank, the system uses the ship via on the Order Header.

Example: The following ship via overrides exist in the Item Ship Via Override table.

Item	Eligible Ship Via Override Codes for Item
ABC	1
	2

Item	Eligible Ship Via Override Codes for Item
BCD	1
	2
	3

You place an order for items ABC and BCD.

- The ship via on the order header is ship via code 1.
- The ship via code on the order detail for item ABC is ship via code 2.
- The ship via code on the order detail for item BCD is ship via code 3.

During pick slip generation, the system creates a separate pick slip for item ABC and BCD.

- The system updates the *Ship via* field in the Pick Control Header record for the pick slip for item ABC to ship via code 2.
- The system updates the *Ship via* field in the Pick Control Header record for the pick slip for item BCD to ship via code 3.

4. For multi line pick slips, use the ship via defined on the Order Header.

If the pick slip does not qualify for a ship via override, or the ship via override does not pass [Ship Via Override Validation during Pick Slip Generation](#), the system updates the *Ship via* field in the Pick Control Header record to the ship via code defined on the Order Header record.

Ship Via Override Validation during Pick Slip Generation

Before the system applies a ship via override to the Pick Control Header record, the system validates that the ship via code is a valid shipper for each item on the associated Pick Control Detail records.

The system looks at the Item Ship Via Override table for each item on the Pick Control Detail records.

- If a ship via override exists in the Item Ship Via Override table for the item, the system validates that the ship via override for the Pick Control Header record exists as a valid ship via override for the item.
 - If the ship via override for the Pick Control Header record exists as a valid ship via override for the item, the system allows the ship via override to the Pick Control Header record.
 - If the ship via override for the Pick Control Header record does not exist as a valid ship via override for the item, the system does not allow the ship via override to the Pick Control Header record.
- If a ship via override does not exist in the Item Ship Via Override table for any of the items on the Pick Control Detail records, the system allows the ship via override to the Pick Control Header record.



Note:

The system performs this validation only if the ship via code defined on the Order Detail record is blank or matches the ship via code on the Order Header.

For more information: See [Working with Item Ship Via Overrides](#) for more information on defining item ship via overrides.

Determining Whether to Hold Pick Slips Due to Allocation Errors

The setting of the [Withhold Picks due to Item Allocation Error \(F04\)](#) system control value defines whether the system prints a pick slip for an order when an item on the order creates a stock allocation error.

- If selected, the system does not print a pick slip for any item that is on the same order as the item that has the item stock allocation error, even if the item will print on a separate pick slip.
- If unselected, the system prints a pick slip for items on the order that did not create item stock allocation errors. If the item that has the item stock allocation error is part of a set or is part of a coordinate group, the system holds the other items that are part of the set or coordinate group.

Order history: The system creates an order transaction history message for the item that has the item stock allocation error: *PICK GEN Item Allocation error - Order line 1.*

Pick slip totals: The system recalculates the pick slip totals so that amounts related to items with an allocation error are not included on the pick slip.

Example 1: An example of how the system generates a pick slip when the *Withhold Picks Due to Item Allocation Error* system control value is selected.

Streamlined Pick Generation: Withhold Picks Due to Allocation Error Selected

Order Line	Item Type	Status	Coordinate Group #
1	regular item resulting in allocation error	in-stock	1
2	ship alone item	in-stock	
3	coordinate group item	in-stock	1
4	coordinate group item	in-stock	1
5.	regular item	in-stock	1

Result for all:

The system does not print a pick slip for the item which created an allocation error. The item is listed on the Item Stock Allocation Error report.

Also, the system does not print a pick slip for any item that is on the same order as the item that has the item stock allocation error.

Example 2: An example of how the system generates a pick slip when the *Withhold Picks Due to Item Allocation Errors* system control value is unselected.

Withhold Picks Due to Item Allocation Error = Unselected

Order Line	Item Type	Status	Coordinate Group Number	Result
1	regular item resulting in allocation error	in-stock	1	The system does not print a pick slip for the item which created an allocation error. The item is listed on the Item Stock Allocation Error report.
2	ship alone item	in-stock		The system prints a separate pick slip for the ship alone item.
3	coordinate group item	in-stock	1	The system does not print a pick slip for the 2 items that are coordinate grouped with the item that has the item stock allocation error.
4	coordinate group item	in-stock	1	
5	regular item	in-stock		The system prints a pick slip for the regular item.

Performing Updates After Successful Allocation

The system performs the following updates after the quantity required for the pick slip is successfully allocated.

Item Location Table

The system updates each record in the Item Location table whose stock was used during allocation processing.

Field	Description
Printed Qty	The system increases the printed quantity by the <i>Qty printed</i> from the Pick Control Detail record. For example, if the existing printed quantity for the Item Location record is 1 and you print a pick slip for a quantity of 2, the system updates the <i>Printed qty</i> to 3.

Order Ship To Table

Field	Description
# Picks outstanding	The system increases this field by the number of pick slips generated for the order ship to in the pick slip generation run.
Last pick print date	The system updates this field with the date of the pick slip generation run.

Order Detail Table

For each record in the Pick Control Detail table that was allocated successfully, the system updates the associated record in the Order Detail table.

Field	Description
Qty printed	The system increases the printed quantity by the <i>Qty printed</i> from the Pick Control Detail record. For example, if the existing printed quantity for the Order Detail record is 1 and you print a pick slip for a quantity of 2, the system updates the <i>Qty printed</i> to 3.
Date printed	The date pick slip generation was run.

Pick Control Detail Table

Field	Description
Qty printed	The system updates this field to the allocated quantity for the pick control line.

Pick Control Header Table

Field	Description
Date printed	The date pick slip generation was run.
Time printed	The time pick slip generation was run.
	NOTE: The system does not populate the <i>Pick zone 1 - 6</i> fields if you Use Streamlined Allocation (L63) .
Pick zone 1	The first zone to pick from in alphabetical sequence. An asterisk (*) displays if: - the number of zones to pick from is greater than 6, or - the number of zones to pick from is greater than the number defined in the Maximum Number of Zones (B41) system control value.
Pick zone 2	The second zone to pick from in alphabetical sequence. An asterisk (*) displays if: - the number of zones to pick from is greater than 6, or - the number of zones to pick from is greater than the number defined in the Maximum Number of Zones (B41) system control value.
Pick zone 3	The third zone to pick from in alphabetical sequence. An asterisk (*) displays if: - the number of zones to pick from is greater than 6, or - the number of zones to pick from is greater than the number defined in the Maximum Number of Zones (B41) system control value.
Pick zone 4	The fourth zone to pick from in alphabetical sequence. An asterisk (*) displays if: - the number of zones to pick from is greater than 6, or - the number of zones to pick from is greater than the number defined in the Maximum Number of Zones (B41) system control value.

Field	Description
Pick zone 5	The fifth zone to pick from in alphabetical sequence. An asterisk (*) displays if: - the number of zones to pick from is greater than 6, or - the number of zones to pick from is greater than the number defined in the Maximum Number of Zones (B41) system control value.
Pick zone 6	The sixth zone to pick from in alphabetical sequence. An asterisk (*) displays if: - the number of zones to pick from is greater than 6, or - the number of zones to pick from is greater than the number defined in the Maximum Number of Zones (B41) system control value.
# of lines	The number of associated records in the Pick Control Detail table.
Ship via code	The ship via code assigned to the pick control header. See Determining the Shipper for the Pick Slip for more information on how the system determines the ship via code to default to the Pick Control Header record and pick slip.

Pick Control Header Extended Table



Note:

The system does not populate the *Cube size of pick*, *Weight of pick*, or *Picking seq array* fields if you *Use Streamlined Allocation (L63)*.

Field	Description
Cube size of pick	The system updates the cube size of the pick slip based on the cube of pick calculation. See Determining the Weight and Cube of the Pick Slip .
Weight of pick	The system updates the weight of the pick slip based on the weight of pick calculation. See Determining the Weight and Cube of the Pick Slip .

Field	Description
Picking seq array	- If the Sort Picks by Pick Sequence (E89) and Load Location into Pick Sequence (G34) system control values are selected, the system updates this field with the location codes in alphanumeric order where the items on the pick slip were allocated from. For example, if the items were allocated from locations PRIMARY and A01, the system displays <i>A01 PRIMARY</i> in this field. - If the Sort Picks by Pick Sequence (E89) system control value is selected and the Load Location into Pick Sequence (G34) system control value is unselected, the system updates this field with the location picking sequence numbers in numeric order where the items on the pick slip were allocated from. For example, if the items were allocated from locations PRIMARY (picking sequence # 3) and A01 (picking sequence # 1), the system displays <i>00000010000003</i> in this field. NOTE: The system can display up to 25 locations or location picking sequence numbers in this field. If more than one pick slip detail record used the same item location to allocate from, the system displays the location or location picking sequence number in the picking sequence array once.

Pick Location Table

The system creates a record in the Pick Location table for each location whose stock was used during allocation processing.

Field	Description
Company	The <i>Company</i> from the Pick Control Detail record.
PCH control #	The <i>PCH Control #</i> from the Pick Control Detail record.
PCD Line #	The <i>PCD Line #</i> from the Pick Control Detail record.
PDL CMP company	The <i>ROL CMP Company</i> from the Reserved Order Line record.
Warehouse	The <i>ROL WHS Warehouse</i> from the Reserved Order Line record.
Location	- If performing Allocation Processing Against Multiple Locations, this is the item location where the pick slip quantity was allocated from. If the system allocates the pick slip quantity from more than one item location, the system creates multiple records in the Pick Location table. - If performing Allocation Processing Against Primary Primary Location, this is the <i>Location</i> from the SKU record. This is the item's primary primary location.
PDL Qty allocated	The <i>PCD Qty printed</i> from the Pick Control Detail record.
PDL Zone	The <i>Location zone</i> from the Location record.
PDL Picking Sequence	The <i>Picking sequence</i> from the Location record.
PDL Billing Batch #	The <i>PCH Billing batch #</i> from the Pick Control Header record.
PDL Cart Batch #	The <i>PCH Cart batch #</i> from the Pick Control Header record. NOTE: The system does not populate this field if you <i>Use Streamlined Allocation (L63)</i> .
PDL Cart Bin #	The <i>PCD Cart bin #</i> from the Pick Control Detail record. NOTE: The system does not populate this field if you <i>Use Streamlined Allocation (L63)</i> .

Field	Description
Order #	The <i>Order #</i> from the Pick Control Detail record.
Ship to #	The <i>Ship to #</i> from the Pick Control Detail record.
PDL ITM Number	The <i>ITM Number</i> from the Pick Control Detail record.
PDL SKU Code	The <i>SKU Code</i> from the Pick Control Detail record.

Streamlined Allocation

If the *Use Streamlined Allocation (L63)* system control value is selected, the system performs streamlined allocation during pick slip generation.

When would you perform streamlined allocation? If you integrate with a warehouse management system, you might use the *Generic Pick Out API* to communicate pick slip information to the external system. In this case, you can accelerate pick slip processing by performing streamlined allocation.

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



Note:

The system performs Streamlined Allocation only if the [Bypass Creation of Pick Forms during WSPS Pick Generation \(K55\)](#) system control value is selected.

When the *Use Streamlined Allocation (L63)* system control value is selected, the system allocates the entire quantity printed (and reserved) on the pick slips from the item's primary primary location in the warehouse on the Pick Control Header.

Retail pickup or delivery orders? If there are any retail pickup or delivery orders eligible for pick slip generation, the system uses streamlined allocation only if:

- the [Use OROB Status Inquiry List Web Service \(M05\)](#) system control value is set to CANCELED or ALL, and
- the [Message Version Number](#) property is higher than 4.0

See the [Use OROB Status Inquiry List Web Service \(M05\)](#) system control value for a discussion.

During streamlined allocation, the system:

#	Step
1.	Verifies that a primary primary location is defined for the item. If a primary primary location is not defined for the item, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: No prime loc.
2.	Determines if the item's primary primary location is in the warehouse defined on the Pick Control Header record. - If the item's primary primary location is not in the warehouse defined on the Pick Control Header record, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: No prime loc. - If the item's primary primary location is in the warehouse defined on the Pick Control Header record, the system continues with allocation processing.

#	Step
3.	The system verifies that the item's primary primary location is eligible for allocation. The item's primary primary location is not eligible for allocation if: • The <i>Allocation freeze</i> field for the Item Warehouse record is Y. In this situation, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: Itm Whs Rsv Frz. • The <i>Freeze</i> field for the Location record is Y. In this situation, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: Loc frozen. • The <i>Pickable location</i> field for the Location record is N or blank. In this situation, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: Loc unpickable. • The <i>Freeze flag</i> field for the Item Location record is Y. In this situation, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: Itm Loc Rsv Frz. • The <i>Pending transaction quantity</i> field for the Item Location record is less than 0. In this situation, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: Neg Pend Qty.
4.	If no item stock allocation errors exist, the system allocates the quantity required for the pick slip from the item's primary primary location.



Note:

The system will not generate a stock allocation error if there is not enough stock in the item's primary primary location.

5.	The system does several updates after allocation; see Performing Updates After Successful Allocation .

Bypassed allocation processing: Streamlined allocation bypasses the following:

- Ignores the setting and does not perform any functionality related to the following system control values:
 - [Inventory Sharing \(A69\)](#)
 - [Sort Picks by Pick Sequence \(E89\)](#)
 - [Load Location into Pick Sequence \(G34\)](#)
 - [Check Location Quantities During Pick Generation \(C54\)](#)
 - [Include Bulk Locations in Primary Primary Availability \(F87\)](#)
 - [Include Secondary Locations in Primary Primary Availability \(F88\)](#)
 - [Let Down Replenishment \(C36\)](#)
- Does not perform any calculations to determine the weight and cube of the pick slip.
- Only overrides the ship via that defaults to the [Pick Control Header Table](#) if a ship via override is defined for the pick slip generation template; the system does not override the ship via to the alternate ship via defined for the ship via on the order header.
- Does not populate the *Pick zone 1 - 6* fields in the Pick Control Header table.

- Does not populate the *Picking sequence array* field in the Pick Control Header Extended and Pick Sort GH tables.
- Does not populate the *Cube size of pick* and *Weight of pick* fields in the Pick Control Header Extended table.
- Does not populate the *PDL Zone*, *PDL Picking Sequence*, *PDL Cart Batch #*, or *PDL Cart Bin #* fields in the Pick Location table.

Allocation Processing Against Multiple Locations

When the [Check Location Quantities During Pick Generation \(C54\)](#) system control value is selected, the system allocates inventory from the first pickable location with enough stock to satisfy the quantity printed on the pick slip. If there is not enough stock, the system allocates inventory across multiple pickable locations, beginning with primary, secondary, then bulk locations.

The system performs the following steps for each pick control detail record in the pick slip generation run when the [Check Location Quantities During Pick Generation \(C54\)](#) system control value is selected.

#	Step
1.	The system verifies that the Item warehouse record associated with the warehouse on the Reserved Order Line is not frozen. • If the <i>Allocation freeze</i> field for the Item Warehouse record is Y, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: Itm Whs Rsv Frz. • If the <i>Allocation freeze</i> field for the Item Warehouse record is N or blank, the system continues with allocation processing.
2.	The system determines which item locations are eligible for allocation. Item locations excluded from allocation: The system excludes an item location from the list of locations available to allocate from if: • The <i>Freeze</i> field for the Location record is Y. • The <i>Pickable location</i> field for the Location record is N or blank. • The <i>Freeze flag</i> field for the Item Location record is Y.
3.	The system uses the following calculation to determine the quantity available in each eligible item location. Item location available quantity calculation: On hand qty in Item Location - negative Pending transaction qty in Item Location - Printed qty in Item Location = Available quantity in Item Location NOTE: If the pending transaction quantity for the item location is a positive quantity, the system does not include it in the calculation.

#	Step
4.	The system tries to allocate the pick slip detail quantity against one item location, comparing the quantity required for the Pick Control Detail record to the calculated available quantity in the item location. The system uses the following hierarchy when searching for an item location that can fulfill the entire pick slip detail quantity. 1. Allocate the entire pick slip detail quantity from one primary pickable location, searching primary locations in alphabetical sequence. NOTE: The system does not consider the item's primary primary location first. • If the Include Bulk Locations in Primary Primary Availability (F87) system control value is selected, the system includes the quantity in non-pickable bulk locations in the available pick quantity for the primary primary location. See Example: Include Non-Pickable Bulk Locations in Primary Primary Availability for an example. • If the Include Secondary Locations in Primary Primary Availability (F88) system control value is selected, the system includes the quantity in non-pickable secondary locations in the available pick quantity for the primary primary location. See Example: Include Non-Pickable Secondary Locations in Primary Primary Availability for an example. • If both the Include Bulk Locations in Primary Primary Availability (F87) and Include Secondary Locations in Primary Primary Availability (F88) system control values are selected, the system includes stock from non-pickable bulk locations in the primary primary location's availability before including stock from non-pickable secondary locations in the primary primary location's availability. See Example: Include Non-Pickable Bulk and Secondary Locations in Primary Primary Availability for an example. 2. If the entire pick slip detail quantity cannot be allocated from one primary pickable location, allocate the entire quantity from one secondary pickable location, searching secondary locations in alphabetical sequence. 3. If the entire pick slip detail quantity cannot be allocated from one secondary pickable location, allocate the entire quantity from one bulk pickable location, searching bulk locations in alphabetical sequence.

#	Step
5.	If the system cannot allocate the entire pick slip detail quantity against one item location, the system tries to allocate the pick slip detail quantity across item locations until the <i>Quantity ordered</i> for the Pick Control Detail record has been reached. The system uses the following hierarchy when searching across item locations to fulfill the pick slip detail quantity. 1. Allocate the pick slip detail quantity from primary pickable locations, allocating from primary locations in alphabetical sequence. • If the <i>Include Bulk Locations in Primary Primary Availability (F87)</i> system control value is selected, the system includes the quantity in non-pickable bulk locations in the available pick quantity for the primary primary location. See Example: Include Non-Pickable Bulk Locations in Primary Primary Availability for an example. • If the <i>Include Secondary Locations in Primary Primary Availability (F88)</i> system control value is selected, the system includes the quantity in non-pickable secondary locations in the available pick quantity for the primary primary location. See Example: Include Non-Pickable Secondary Locations in Primary Primary Availability for an example. • If both the <i>Include Bulk Locations in Primary Primary Availability (F87)</i> and <i>Secondary Locations in Primary Primary Availability (F88)</i> system control values are selected, the system includes stock from non-pickable bulk locations in the primary primary location's availability before including stock from non-pickable secondary locations in the primary primary location's availability. See Example: Include Non-Pickable Bulk and Secondary Locations in Primary Primary Availability for an example. 2. If the entire pick slip detail quantity cannot be allocated from primary pickable locations only, continue allocating the pick slip detail quantity from secondary pickable locations, allocating from secondary locations in alphabetical sequence. 3. If the entire pick slip detail quantity cannot be allocated from primary and secondary pickable locations, continue allocating the pick slip detail quantity from bulk pickable locations, allocating from bulk locations in alphabetical sequence.
6.	If the system cannot allocate the entire pick slip detail quantity across item locations, the system determines the setting of the Let Down Replenishment (C36) system control value. • If the Let Down Replenishment (C36) system control value is set to REPORT or RPT/EXEC, the system performs let down replenishment to restock the item locations in order to complete allocation processing. See Let Down Replenishment for processing information. • If the Let Down Replenishment (C36) system control value is set to *NONE, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: No stock in Pck.
7.	If the system is able to allocate the pick slip quantity in the Item Warehouse, the system allocates the stock and continues with pick slip generation processing; see Performing Updates After Successful Allocation.

Examples: Allocation Against Multiple Locations

- [Example: Allocate Against One Item Location](#)
- [Example: Allocate Against Multiple Item Locations](#)
- [Example: Include Non-Pickable Secondary Locations in Primary Primary Availability](#)
- [Example: Include Non-Pickable Bulk Locations in Primary Primary Availability](#)
- [Example: Include Non-Pickable Bulk and Secondary Locations in Primary Primary Availability](#)

Example: Allocate Against One Item Location

In this example:

- The *Check Location Quantities During Pick Generation (C54)* system control value is selected.
- The *Include Secondary Locations in Primary Primary Availability (F88)* system control value is unselected.
- The *Include Bulk Locations in Primary Primary Availability (F87)* system control value is unselected.

You generate a pick slip for item ABC for a quantity of 25.

Item ABC exists in the following item locations that are eligible for allocation.

Location	Location Type	On Hand Qty	Pending Transaction Qty	Printed Qty
A1	P (primary)	10	-2	0
A2	P (primary)	10	0	8
PRIMARY	P (primary)	25	0	20
B1	S (secondary)	10	0	0
B2	S (secondary)	25	50	0

The system calculates the available quantity for each item location.

- location A1 = 8 (10 on hand - 2 negative pending transaction = 8 available)
- location A2 = 2 (10 on hand - 8 printed = 2 available)
- location PRIMARY = 5 (25 on hand - 20 printed = 5 available)
- location B1 = 10
- location B2 = 25

Because item location B2 has enough available stock to fulfill the entire pick slip quantity of 25, the system allocates the entire pick slip quantity from location B2.

Example: Allocate Against Multiple Item Locations

In this example:

- The *Check Location Quantities During Pick Generation (C54)* system control value is selected.
- The *Include Secondary Locations in Primary Primary Availability (F88)* system control value is unselected.
- The *Include Bulk Locations in Primary Primary Availability (F87)* system control value is unselected.

You generate a pick slip for item ABC for a quantity of 50.

Item ABC exists in the following item locations that are eligible for allocation.

Location	Location Type	On Hand Qty	Pending Transaction Qty	Printed Qty
A1	P (primary)	10	-2	0
A2	P (primary)	10	0	8
PRIMARY	P (primary)	25	0	20

Location	Location Type	On Hand Qty	Pending Transaction Qty	Printed Qty
B1	S (secondary)	10	0	0
B2	S (secondary)	25	50	0

The system calculates the available quantity for each item location.

- location A1 = 8 (10 on hand - 2 negative pending transaction = 8 available)
- location A2 = 2 (10 on hand - 8 printed = 2 available)
- location PRIMARY = 5 (25 on hand - 20 printed = 5 available)
- location B1 = 10
- location B2 = 25

Because an item location does not exist that can fulfill the entire pick slip quantity of 50, the system allocates the pick slip quantity across pickable locations, starting with primary locations in alphanumeric order and then secondary locations in alphanumeric order. The system allocates stock in the following order:

- 8 units from location A1.
- 2 units from location A2.
- 5 units from location PRIMARY.
- 10 units from location B1.
- 25 units from location B2.

Example: Include Non-Pickable Secondary Locations in Primary Primary Availability

In this example:

- The Check Location Quantities During Pick Generation (C54) system control value is selected.
- The Include Secondary Locations in Primary Primary Availability (F88) system control value is selected.
- The Include Bulk Locations in Primary Primary Availability (F87) system control value is unselected.

You generate a pick slip for item ABC for a quantity of 50.

Item ABC exists in the following item locations that are eligible for allocation. Location PRIMARY is the item's primary primary location.

Location	Location Type	Pickable?	On Hand Qty	Pending Transaction Qty	Printed Qty
A1	P (primary)	Y	10	-2	
A2	P (primary)	Y	10	0	8
PRIMARY	P (primary)	Y	25	0	20
B1	S (secondary)	Y	10	0	0
B2	S (secondary)	Y	25	50	0

Location	Location Type	Pickable?	On Hand Qty	Pending Transaction Qty	Printed Qty
B3	S (secondary)	N	25	0	0

The system calculates the available quantity for each item location.

- location A1 = 8 (10 on hand - 2 negative pending transaction = 8 available)
- location A2 = 2 (10 on hand - 8 printed = 2 available)
- location PRIMARY = 5 (25 on hand - 20 printed = 5 available)
- location B1 = 10
- location B2 = 25
- location B3 = 25 (included in the available pick quantity for location PRIMARY)

Because an item location does not exist that can fulfill the entire pick slip quantity of 50, the system allocates the pick slip quantity across pickable locations, starting with primary locations in alphanumeric order and then secondary locations in alphanumeric order. The system allocates stock in the following order:

- 8 units from location A1.
- 2 units from location A2.
- 30 units from location PRIMARY (5 available + 25 from B3 = 30)
- 10 units from location B1



Note:

In order for the system to pick 30 units from location PRIMARY, you must transfer the 25 units in location B3 to location PRIMARY.

Example: Include Non-Pickable Bulk Locations in Primary Primary Availability

In this example:

- The Check Location Quantities During Pick Generation (C54) system control value is selected.
- The Include Secondary Locations in Primary Primary Availability (F88) system control value is unselected.
- The Include Bulk Locations in Primary Primary Availability (F87) system control value is selected.

You generate a pick slip for item ABC for a quantity of 50.

Item ABC exists in the following item locations that are eligible for allocation. Location PRIMARY is the item's primary primary location.

Location	Location Type	Pickable	On Hand Qty	Pending Transaction Qty	Printed Qty
A1	P (primary)	Y	10	-2	

Location	Location Type	Pickable	On Hand Qty	Pending Transaction Qty	Printed Qty
A2	P (primary)	Y	10	0	8
PRIMARY	P (primary)	Y	25	0	20
B1	S (secondary)	Y	10	0	0
B2	S (secondary)	Y	25	50	0
C1	B (bulk)	N	100	0	0

The system calculates the available quantity for each item location.

- location A1 = 8 (10 on hand - 2 negative pending transaction = 8 available)
- location A2 = 2 (10 on hand - 8 printed = 2 available)
- location PRIMARY = 5 (25 on hand - 20 printed = 5 available)
- location B1 = 10
- location B2 = 25
- location C1 = 100 (included in the available pick quantity for location PRIMARY)

Because item location PRIMARY has enough available stock to fulfill the entire pick slip quantity of 50 (once 45 units are added to the PRIMARY location's availability), the system allocates the entire pick slip quantity from location PRIMARY.



Note:

In order for the system to pick 50 units from location PRIMARY, you must transfer the 45 units in location C1 to location PRIMARY.

Example: Include Non-Pickable Bulk and Secondary Locations in Primary Primary Availability

In this example:

- The Check Location Quantities During Pick Generation (C54) system control value is selected.
- The Include Secondary Locations in Primary Primary Availability (F88) system control value is selected.
- The Include Bulk Locations in Primary Primary Availability (F87) system control value is unselected.

You generate a pick slip for item ABC for a quantity of 75.

Item ABC exists in the following item locations that are eligible for allocation. Location PRIMARY is the item's primary primary location.

Location	Location Type	Pickable	On Hand Qty	Pending Transaction Qty	Printed Qty
A1	P (primary)	Y	10	-2	
A2	P (primary)	Y	10	0	8

Location	Location Type	Pickable	On Hand Qty	Pending Transaction Qty	Printed Qty
PRIMARY	P (primary)	Y	25	0	20
B1	S (secondary)	Y	50	0	0
B2	S (secondary)	Y	50	50	0
B3	S (secondary)	N	25	0	0
C1	B (bulk)	N	25	0	0

The system calculates the available quantity for each item location.

- location A1 = 8 (10 on hand - 2 negative pending transaction = 8 available)
- location A2 = 2 (10 on hand - 8 printed = 2 available)
- location PRIMARY = 5 (25 on hand - 20 printed = 5 available)
- location B1 = 10
- location B2 = 25
- location C1 = 50 (included in the available pick quantity for location PRIMARY)
- location B3 = 25 (included in the available pick quantity for location PRIMARY)

Because an item location does not exist that can fulfill the entire pick slip quantity of 75, the system allocates the pick slip quantity across pickable locations, starting with primary locations in alphanumeric order and then secondary locations in alphanumeric order. The system allocates stock in the following order:

- 8 units from location A1.
- 2 units from location A2.
- 55 units from location PRIMARY (5 available + 25 from C1 + 25 from B3 = 55)
- 10 units from location B1.



Note:

In order for the system to pick 65 units from location PRIMARY, you must transfer the 25 units from location C1 and the 25 units from location B3 to location PRIMARY.

Allocation Processing Against Primary Primary Location

When the Check Location Quantities During Pick Generation (C54) system control value is unselected, the system allocates the entire quantity printed (and reserved) on the pick slips from the item's primary primary location. Even if the primary primary location does not contain this quantity, the system determined that this quantity is available in the warehouse. You must perform replenishment immediately after running pick slip generation to transfer stock from secondary and bulk locations to the primary primary location to satisfy the quantities printed on the pick slips.

The system does the following steps when the Check Location Quantities During Pick Generation (C54) system control value is unselected.

#	Step
1.	The system verifies that a primary primary location is defined for the item. If a primary primary location is not defined for the item, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: No prime loc.
2.	The system determines if the item's primary primary location is in the warehouse defined on the Pick Control Header record. - If the item's primary primary location is not in the warehouse defined on the Pick Control Header record, the system does not print the item on the pick slip. NOTE: The system does not include this error on the Item Stock Allocation Error Report because the item is placed in a backorder status on the order. - If the item's primary primary location is in the warehouse defined on the Pick Control Header record, the system continues with allocation processing.
3.	The system verifies that the item's primary primary location is eligible for allocation. The item's primary primary location is not eligible for allocation if: - The <i>Allocation freeze</i> field for the Item Warehouse record is Y. In this situation, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: Itm Whs Rsv Frz. - The <i>Freeze</i> field for the Location record is Y. In this situation, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: Loc frozen. - The <i>Pickable location</i> field for the Location record is N or blank. In this situation, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: Loc unpickable. - The <i>Freeze flag</i> field for the Item Location record is Y. In this situation, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: Itm Loc Rsv Frz. - The <i>Pending transaction quantity</i> field for the Item Location record is less than 0. In this situation, the system does not print the item on the pick slip and instead includes the item on the Item Stock Allocation Error Report: Neg Pend Qty. Verification for secondary and bulk locations: If the system needs to pull inventory from a non-pickable secondary or bulk location in order to replenish the primary primary location, the system: - Does not verify that the <i>Freeze</i> flag for the location is N or blank. - Does not verify that the <i>Freeze flag</i> for the item location is N or blank. - Does not verify that the <i>Pending transaction quantity</i> for the item location is equal or greater than 0.
4.	If no item stock allocation errors exist, the system allocates the quantity required for the pick slip from the item's primary primary location. NOTE: If the system used inventory from a non-pickable secondary or bulk location in order to fulfill the pick slip, you must perform replenishment immediately after running pick slip generation to transfer stock from secondary and bulk locations to the primary location to satisfy the quantity printed on the pick slip.
5.	The system does several updates after allocation; see Performing Updates After Successful Allocation.

Examples: Allocation Against Primary Primary Location

- Example: [Primary Primary Item Location with Enough Inventory](#)
- Example: [Item Warehouse with Enough Inventory](#)

Example: Primary Primary Item Location with Enough Inventory

In this example, the primary primary location has enough on hand inventory to fulfill the pick slip.

Item ABC has the following locations in warehouse 2.

Location	On Hand	Pending
A1 (pickable primary primary location)	10	0
C1 (non-pickable bulk location)	10	0

You place an order for item ABC for a quantity of 8.

When you run pick slip generation, the system generates a pick slip for item ABC, pulling the 8 units needed for the pick slip from warehouse 2, location A1.

The system decreases the on hand quantity for the item locations by the quantity used by the pick slip.

Location	On Hand	Pending
A1 (pickable primary primary location)	2	0
C1 (non-pickable bulk location)	10	0

Example: Item Warehouse with Enough Inventory

In this example, the primary primary location does not have enough on hand quantity to fulfill the pick slip, but the item warehouse does have enough on hand inventory.

Item ABC has the following locations in warehouse 2.

Location	On Hand	Pending
A1 (pickable primary primary location)	2	0
C1 (non-pickable bulk location)	10	0

You place an order for item ABC for a quantity of 8.

When you run pick slip generation, the system generates a pick slip for item ABC, pulling the 8 units needed for the pick slip from warehouse 2, location A1. You will need to perform replenishment immediately after running pick slip generation to transfer stock from bulk locations to the primary locations to satisfy the quantities printed on the pick slips.

The system decreases the on hand quantity for the item locations by the quantity used by the pick slip.

Location	On Hand	Pending
A1 (pickable primary primary location)	4 (assuming the 10 units in bulk were moved to primary primary during replenishment processing)	0
C1 (non-pickable bulk location)	0	0

Confirming and Billing the Pick Slip Immediately

During allocation processing, if the *Generation type* for the Pick Control Header record is I (Bill Immediately), the system confirms and bills the pick slip immediately.

Which items are billed immediately? The system confirms and bills a pick slip immediately for the following types of items:

- virtual stored value card item; see [Stored Value Card Purchase and Activation](#).
- membership item; see [Membership Overview](#).
- subscription item; see [Working with Item Subscriptions \(WISB\)](#).

The system does the following steps during immediate billing.

#	Step
1.	The system updates the record in the Pick Control Header table. • Pick status = C (confirmed) • Date confirmed = The date the record was created. • Time confirmed = The time the record was created. • Include on S/J (sales journal) = Y
2.	The system creates a record in the Billing Header Data Queue table.
3.	The system creates a record in the Billing Detail Data Queue table for each record in the Pick Control Detail table that needs to bill immediately.
4.	The system creates a record in the Billing Loc Data Queue table for each record in the Pick Location table that needs to bill immediately.
5.	If the item on the pick slip is a virtual stored value card item, the system creates a record in the Billing SVC Data Queue table.
6.	Once the pick slip has been processed by billing, the system updates the <i>Pick status</i> field for the record in the Pick Control Header table to A (Submitted to Async).

Let Down Replenishment

Overview: Let down replenishment is the automatic restocking of primary locations initiated by the system when you generate pick slips. The system can recommend, or recommend and immediately process, a replenishment transfer, to insure that inventory quantities in primary locations will be adequate for the pick slips you have generated. The Let Down Replenishment (C36) system control value determines whether the system initiates replenishment when you generate pick slips, and whether the system completes the replenishment transfer, or recommends but does not complete the transfer. See [Let Down Replenishment Processing](#).



Note:

Let-down replenishment does not occur through streamlined pick slip generation if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Let Down Replenishment Setup

Before you can process a Let Down Replenishment, you need to complete the necessary setup. Setup includes:

- [System Control Values Related to Let Down Replenishment](#)
- [Location Table](#)
- [Item Location Table](#)

- [Item Warehouse Table](#)

System Control Values Related to Let Down Replenishment

The following system control values relate to Let Down Replenishment.

System Control Value	Description
Let Down Replenishment (C36)	Defines whether the system performs Let Down Replenishment when you generate pick slips, and whether the replenishments will be immediately processed based on the system-recommended inventory transfers, or will be recommended but not processed. • NONE (or blank) = The system does not perform Let Down Replenishment. • REPORT = The system creates the Replenish Control record and its details and generates the Replenishment Detail by From Location report; but, item transfers are not processed immediately. • RPT/EXEC = The system creates the Replenish Control record and its details and generates the Replenishment Detail Report by Item; also, the RPLN_UPD job processes the item transfers automatically.
Check Location Quantities During Pick Generation (C54)	This field must be selected in order to use Let Down Replenishment (C36). See Allocation Processing Against Multiple Locations.
Replenish from Location Type (A66)	Determines the location types from which inventory will be pulled during Let Down Replenishment. • Sec/Bulk = the system replenishes from both secondary and bulk locations. When both location types are used, the system will replenish from bulk locations first in earliest placement date/item location creation sequence, then from secondary locations in earliest placement date/item location creation sequence. • Bulk = the system replenishes from bulk locations only. <i>This option is not implemented.</i> • Secondary = the system replenishes from secondary locations only. <i>This option is not implemented.</i>
Include Print Quantity in Available Calculations (A65)	This field must be selected in order to use Let Down Replenishment (C36). When selected the system includes the number of units needed to fulfill printed pick tickets in the replenishment calculation. By using this option, the system reduces the on-hand quantity in the primary location by the number of units that are to be picked before determining the quantity to replenish. The system also reduces the quantity on-hand in the location that will be used to replenish the primary location by this amount, before determining the quantity available to move.

System Control Value	Description
Consolidated Replenishment Report Program Name (G49)	Defines the print program used to print consolidated replenishment reports. You can use these reports to consolidate replenishment information from multiple let down replenishment transactions processed on the same day. To print consolidated replenishment reports, the following system control values must be set to these values: - Replenish from Location Type (A66) = SEC/BULK, BULK, or SECONDARY. - Check Location Quantities During Pick Generation (C54) = Selected - Let Down Replenishment (C36) = REPORT Leave this field blank if you do not want to print consolidated reports.

Location Table

Type: Identifies which locations can be replenished, and which locations to use to replenish. Valid location types are primary, secondary, bulk, and temporary.

- Primary locations are the only locations that will be replenished.
- Non-pickable secondary and bulk locations are the only location types that can be used to replenish the primary location.

Freeze: The freeze status of the location indicates whether the location is on hold. If the primary location is frozen, it cannot be replenished. If the secondary or bulk location is frozen, inventory in the location cannot be used to replenish a primary location.

Item Location Table

The following fields must be completed for the replenishment calculation to be performed.

Min qty: The minimum number of units of the item/SKU that should be kept in the item location.

Max qty: the maximum number of units of the item/SKU that should be kept in the item location.

Reservation freeze: Indicates whether the item location is frozen. If the item in the primary location is frozen, it cannot be replenished. If the item in the secondary or bulk location is frozen, inventory in the location cannot be used to replenish a primary location. Also, Pick Slip Generation does not print pick slips for an item/location that is frozen.

Placement date: The system uses the placement date to determine the order in which bulk and secondary locations are used to stock the primary locations. The system replenishes from bulk locations first in earliest placement date/item location creation sequence, then from secondary locations in earliest placement date/item location creation sequence.

Item Warehouse Table

Reservation freeze: Indicates whether the item warehouse is frozen. If the item is frozen at the warehouse level, it is not evaluated for replenishment or pick slip allocation at any location.

Let Down Replenishment Processing

The system uses the following steps during Let Down Replenishment.

- Determines if a pickable location for the item on the order has enough inventory to fill the pick slip.**

- If a pickable location for the item on the order has enough inventory to fill the pick slip, the system does not call Let Down Replenishment, and instead, allocates stock from the pickable location and generates a pick slip for the order. See [Pick Slip Allocation Processing](#).
- If a pickable location for the item on the order does not have enough inventory to fill the pick slip, and [Let Down Replenishment Setup](#) has been completed, the system calls Let Down Replenishment.

2. Calculates the replenishment quantity.

The system moves enough stock to the pickable primary location to cover the open pick slips.

Which location to replenish? If a primary primary location is defined for the item, the system replenishes this location; otherwise, the system replenishes the first primary location defined for the item in alphabetical sequence.

The system uses the following calculations to determine the replenishment quantity required for Let Down Replenishment:

Adjusted on hand quantity in primary location calculation:

On-hand quantity in primary location + Positive pending transfer quantity in primary location - Negative pending transfer quantity in primary location - Printed quantity in primary location (if included) = Adjusted on-hand quantity in primary location

- The amount of any pending transfers to the location (a positive pending transfer quantity) is added to the on-hand quantity so that the location is not over-replenished.
- The amount of any pending transfers from the location (a negative pending transfer quantity) is subtracted from the on-hand quantity so the location is not under-replenished.
- The Include Print Quantity in Available Calculations (A65) system control value determines whether the quantity on printed pick slips is included in the calculation so that the location will also be replenished for the items being shipped. This system control value should be selected when using Let Down Replenishment (C36).

Replenishment quantity calculation:

Maximum quantity in primary location - Adjusted on-hand quantity in primary location + Pick slip quantity = Replenishment quantity.

3. Determines where to get the inventory.

If the Replenish from Location Type (A66) system control value is set to SEC/BULK, the system gets inventory first from eligible bulk locations in earliest placement date/ascending item location sequence. If the bulk locations cannot fulfill the entire quantity needed for replenishment, the system then gets inventory from secondary locations in earliest placement date/ascending item location sequence.

The freeze status of the location is also evaluated. If the *Reservation freeze* flag in the Item Location table is selected, the location will not be used to replenish the primary location.

4. Calculates the quantity to move from each bulk and/or secondary location.

If the location is eligible to be used to replenish the pickable primary location, the following calculation is done to determine the available quantity to move from the secondary or bulk location:

Quantity to move from secondary or bulk location calculation:

On hand quantity in secondary or bulk location - Printed quantity in secondary or bulk location (if included) - Negative pending transfer quantity in secondary or bulk location = Quantity to Move from secondary or bulk location

- Negative pending transfer quantities indicate that inventory in the location is in the process of being transferred from the location, but the transfer is not yet reflected in the on-hand quantity. Because this inventory has already been marked for transfer, it is subtracted from the on-hand quantity so that it will not be included in multiple transfers.
- Positive pending transfer quantities indicate that inventory is in the process of being transferred to the location, but the transfer is not yet reflected in the on-hand quantity. Because the inventory may or may not be in the location, it is not included in the on-hand quantity.
- The Include Print Quantity in Available Calculations (A65) system control value determines whether the quantity on printed pick slips is included in the calculation so that the location will also be replenished for the items being shipped. This system control value should be selected to use Let Down Replenishment (C36).

All eligible locations are evaluated in earliest placement date/item location creation sequence until the required quantity to replenish is reached, or until all locations have been evaluated.

What if the quantity available to move does not cover the pick slip quantity? If the quantity that is available to move to the primary location does not cover the pick slip quantity, the system will not perform Let Down Replenishment and instead, print the item on the [Item Stock Allocation Error Report](#).

5. Creates and confirms the Replenishment Control request.

As the system evaluates the primary locations to replenish and the quantities that will be moved from the bulk and/or secondary locations to replenish them, a record for each pending transfer transaction is added to the Replenishment Control request. When the request is generated:

- The *Pending* field in the Item Location table for the primary location is *increased* by the total quantity to transfer.
- The *Pending* field in the Item Location table for each bulk and secondary location that will be used to replenish the location is *decreased* by the quantity to transfer from that location.

6. Looks at the Let Down Replenishment (C36) system control value to determine how to proceed.

- If the Let Down Replenishment (C36) system control value is set to REPORT, the system generates the pick slips and the Replenishment Detail by From Location Report but does not process the replenishment.
- If the Let Down Replenishment (C36) system control value is set to RPT/EXEC, the system continues to the next step.

7. Submits the RPLN_UPD job.

The RPLN_UPD job:

- Increases the on-hand quantity in the primary location by the transaction amount.
- Decreases the pending transfer quantity in the primary location by the transaction amount.
- Decreases the on-hand quantity in the location from which the inventory was transferred by the transaction amount.
- Decreases the pending transfer quantity in the location from which the inventory was transferred by the transfer amount.

- Updates the Inventory Transaction History table with the transaction activity.
- Deletes the processed replenishment control request from the system.

8. Generates the pick slips.

The system also generates the Replenishment Detail Report by Item. You can use this report as a worksheet to move the recommended replenishment quantity to the primary location before you confirm the pick slip.

Let Down Replenishment Example

In this example:

- The Let Down Replenishment (C36) system control value is set to RPT/EXEC or REPORT.
- The Replenish from Location Type (A66) system control value is set to SEC/BULK.
- The Include Print Quantity in Available Calculations (A65) system control value is selected.

The following item locations exist for item A123 in warehouse 5.

Location	Type	Max	Min	On Hand	Printed	Pending	Date
B1	Bulk	120	12	120	0	-108	4/06
B2	Bulk	120	12	24	0	0	4/05
S1	Secondary	60	12	60	0	0	4/04
S2	Secondary	60	12	60	0	0	4/03
M1	Primary	60	12	6	2	2	4/02

A customer places an order for item A123 for a quantity of 50.

When you generate a pick slip for the order, the system allocates the quantity of 50 against location M1 (the item's primary location) and does the following steps:

1. Calculates the *Adjusted on hand quantity* for the primary item location:

On hand quantity + Positive pending quantity - Negative pending quantity - Printed quantity = Adjusted on hand quantity

Location	On Hand Qty	Pending Qty	Printed Qty	Adjusted On Hand Qty
M1	6	2	2	6

2. Calculates the *Replenishment quantity* for the primary item location:

Pick slip quantity - Adjusted on hand quantity = Replenishment quantity

Location	Pick Slip Qty	Adjusted On Hand Qty	Replenishment Qty
M1	50	6	44

3. Calculates the available quantity to move from bulk and secondary locations:

On hand quantity - Printed quantity - Negative pending transfer quantity = Quantity available to move

Location	On Hand Qty	Printed Qty	Pending Qty	Qty Available to Move
B1	120	0	-108	12
B2	24	0	0	24
S1	60	0	0	60
S2	60	0	0	60
Total quantity eligible to replenish primary locations:				156

4. Decides the sequence in which to take stock from the eligible locations. The system first looks at bulk locations in *Earliest placement date/Item location creation* sequence. If the bulk locations cannot fulfill the replenishment quantity, the system then looks at secondary locations in *Earliest placement date/Item location creation* sequence. In this example, the sequence is:

- B2: Bulk location, Placement date 4/05
- B1: Bulk location, Placement date 4/06
- S2: Secondary location, Placement date 4/03
- S1: Secondary location, Placement date 4/04

5. Creates the Replenish Control record, indicating the recommended replenishment quantity to move from bulk and secondary locations to the primary location.

From Location	To Location	Qty to Move
B1	M1	12
B2	M1	24
S2	M1	8

6. Updates the *Pending quantity* for the item locations, based on the recommended replenishment quantities. Also updates the *Printed quantity* for the primary location:

Location	Type	Max	Min	On Hand	Printed	Pending
B1	Bulk	120	12	120	0	-120
B2	Bulk	120	12	24	0	-24
S1	Secondary	60	12	60	0	0
S2	Secondary	60	12	60	0	-8
M1	Primary	60	12	6	52	46

7. If the Let Down Replenishment (C36) system control value is set to RPT/EXEC, the system processes the Let Down Replenishment and updates the *On hand quantity* and *Pending quantity* for the item locations:

Location	Type	Max	Min	On Hand	Printed	Pending
B1	Bulk	120	12	108	0	-108
S1	Secondary	60	12	60	0	0
S2	Secondary	60	12	52	0	0
M1	Primary	60	12	50	52	2

**Note:**

If the Let Down Replenishment (C36) system control value is set to REPORT, the system generates the pick slips and the Replenishment Detail by From Location Report but does not process the replenishment.

8. When you confirm the pick slip, the system updates the *On hand quantity* and *Printed quantity* for the primary location:

Location	Type	Max	Min	On Hand	Printed	Pending
B1	Bulk	120	12	108	0	-108
S1	Secondary	60	12	60	0	0
S2	Secondary	60	12	52	0	0
M1	Primary	60	12	0	2	2

Sorted Pick Sort GH Table

After [Pick Slip Allocation Processing](#) and [Let Down Replenishment](#), the system sorts records in the Pick Sort GH table in the following order in order to:

- Sort pick slips into separate PDF documents correctly. See [Sorting Pick Slips into Separate PDF Documents](#) and [Pick Slip Sort within a Pick Slip PDF Document](#).
- Sort pick slips into cart batches correctly and assign a cart bin number to each pick slip in the cart batch correctly. See [Sorting Pick Slips into Separate Cart Batches](#) and [Pick Slip Sort Within a Cart Batch](#).

**Note:**

Streamlined pick slip generation does not use the Pick Sort GH table if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Sorted Pick Sort GH table:

1. Company
2. Printed
3. Warehouse
4. Billing Batch #
5. Ship Via Priority in descending order
6. Special handling status in descending order
7. Gift Pick in descending order
8. Foreign Country in descending order
9. Single Line in descending order
10. Zone 1
11. Zone 2

12. Zone 3
13. Zone 4
14. Zone 5
15. Zone 6
16. Picking Sequence Array
17. Location
18. Item
19. SKU

**Note:**

The system sorts records in the Pick Sort GH table in this order regardless of the setting of the [Use Cart/Bin Picking? \(B38\)](#) system control value.

Sorting Pick Slips into Separate PDF Documents

The system generates each pick slip form as a PDF (portable document format) file, typically opened through the Adobe Reader or within a separate browser window. Each PDF file has one or more individual pick slip forms, based on the [Reasons to Sort Pick Slips into Separate PDF Documents](#).

Working with the pick slip form: Once the system finishes processing one pick slip PDF document, you can open and print the pick slips in the document using the [Forms Management \(My Forms\)](#); you do not have to wait until all of the PDF documents for the pick slip generation run have generated.

Pick slip form naming convention: The system uses the print program, the user ID of the person who generated pick slips, the job date and time stamp, and the document sort number as the name of the pick slip PDF document. For example, a file named `PICKG.KBROWN.20090804.103001456_002.PDF` indicates this is a pick slip PDF document generated by user KBROWN on August 4, 2009 and the document is the second document for a specific pick sort, such as pick slips for warehouse 1 and ship via priority 5. See [Form Naming Conventions](#) for more information.

Pick sort program name: The setting of the Pick Sort Program Name (C65) system control value defines how the system sorts pick slips into separate PDF documents. The base pick sort program FLR2017 is described under [Reasons to Sort Pick Slips into Separate PDF Documents](#). The sorting order of your pick slips may vary depending on the pick sort program name you define in this system control value.

**Note:**

Streamlined pick slip generation does not generate printable pick slips if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Reasons to Sort Pick Slips into Separate PDF Documents

The system creates a new pick slip PDF document for the following reasons. The system uses the [Sorted Pick Sort GH Table](#) to decide how to sort the pick slips into separate pick slip PDF documents.

Once the system decides how many pick slip PDF documents to generate, the system decides how to sort the pick slips within the PDF document; see [Pick Slip Sort within a Pick Slip PDF Document](#).

Reason to Sort a Pick Slip into a Separate PDF Document	Description
Warehouse	The system creates a separate pick slip PDF document for each warehouse. Example: The system creates a separate pick slip for: - pick slips for warehouse 1. - pick slips for warehouse 2.
Special handling pick slip	If the Split Special Handling Picks (L44) system control value is selected, the system creates a separate pick slip PDF document for special handling items. Also, when pre-generated picks are created, the system creates a separate pre-generated pick for the items on the order that contain a special handling code to further ensure that items that require special handling are not included on the same pick slip as items that do not require special handling. Example: The system creates a separate pick slip for: - picks that contain items that require special handling. - picks that do not contain any items that require special handling. NOTE: The <i>Special Handling</i> field on the Streamlined Pick Slip Generation Screen defines whether pick slip generation generates picks for items that require special handling: - Include = Generate pick slips, regardless of the special handling flag for an item. - Only = Perform pick slip generation only for picks that contain an item that requires special handling. - Exclude = Perform pick slip generation only for picks that do not contain an item that requires special handling.
Ship via priority	Within each warehouse, the system creates a separate pick slip PDF document for each ship via priority, in descending order. Example: The system creates a separate pick slip PDF document for: - warehouse 1, ship via priority 2 - warehouse 1, ship via priority 1 - warehouse 2, ship via priority 5 NOTE: If the system creates a separate pick slip PDF document for special handling items, the system does not create a separate pick slip PDF document based on ship via priority. Example: The system creates a separate pick slip PDF document for: - pick slips that contain special handling items, any ship via priority. - pick slips that do not contain special handling items, warehouse 1, ship via priority 2. - pick slips that do not contain special handling items, warehouse 1, ship via priority 1. - pick slips that do not contain special handling items, warehouse 2, ship via priority 5.

Reason to Sort a Pick Slip into a Separate PDF Document	Description
Maximum Number of Pick Slips Per Spool File Setting	The PICKS_IN_SPOOL_FILE setting in Working with Admin Properties (CPRP) indicates the maximum number of pick slips in a single PDF document. If the number of pick slips in a PDF document reaches the number defined in the PICKS_IN_SPOOL_FILE setting, the system creates a new PDF document. See Specify the Maximum Number of Pick Slips Per Spool File for more information.

Example: Sorting Pick Slips into Separate Pick Slip PDF Documents

The system generates the following pick slips. In this example:

- The Split Special Handling Picks (L44) system control value is unselected.
- The PICKS_IN_SPOOL_FILE setting in [Working with Customer Properties \(PROP\)](#) is set to 250.

Pick Slip Count	Warehouse	Ship Via Priority
50	1	1
75	2	1
300	1	5
225	2	5
25	2	9
510	1	9

Based on the [Reasons to Sort Pick Slips into Separate PDF Documents](#), the system sorts the pick slips into 9 separate pick slip PDF documents:

- 50 pick slips for warehouse 1, ship via priority 1
- 250 pick slips for warehouse 1, ship via priority 5
- 50 pick slips for warehouse 1, ship via priority 5
- 250 pick slips for warehouse 1, ship via priority 9
- 250 pick slips for warehouse 1, ship via priority 9
- 10 pick slips for warehouse 1, ship via priority 9
- 75 pick slips for warehouse 2, ship via priority 1
- 225 pick slips for warehouse 2, ship via priority 5
- 25 pick slips for warehouse 2, ship via priority 9

Notice that the system creates multiple PDF documents for pick slips in warehouse 1, ship via priority 5 and for pick slips in warehouse 1, ship via priority 9, based on 250 in the PICKS_IN_SPOOL_FILE setting.

Voiding and reprinting pick slips:

- If you select the Reprint option for a pick slip, the system creates a separate pick slip PDF document based on warehouse, ship via priority, the Split Special Handling Picks (L44)

system control value, and the PICKS_IN_SPOOL_FILE setting in [Working with Customer Properties \(PROP\)](#).

- If you select the Reprint All option, the system does not create a separate pick slip PDF document based on warehouse, ship via priority, or the Split Special Handling Picks (L44) system control value. The system will create a separate pick slip PDF document based only on the PICKS_IN_SPOOL_FILE setting in [Working with Customer Properties \(PROP\)](#).

See [Reprinting and Voiding Pick Slips \(WVRP or WSVF\)](#) for more information on voiding and reprinting pick slips.

Pick Slip Sort within a Pick Slip PDF Document

The system uses the [Sorted Pick Sort GH Table](#) to decide how to sort the pick slips within a pick slip PDF document.

The system prints pick slips that contain one pick detail line before printing pick slips that contain multiple detail lines. Also, the following system control values determine whether the system sorts gift orders and foreign orders before non-gift orders and domestic orders.

Sort picks by gift flag?

- If the [Sort Pick Slips by Gift Flag \(D53\)](#) system control value is selected, the system prints pick slips for gift orders before pick slips for non-gift orders. The system considers the order a gift order if the *Gift* flag on the Order Ship To record is Y.
- If the [Sort Pick Slips by Gift Flag \(D53\)](#) system control value is unselected, the system does not include the gift order setting in the pick slip sort.

Sort picks by shipping destination?

- If the [Sort Picks by Foreign/Domestic Flag \(D54\)](#) system control value is selected, the system prints pick slips for foreign shipping addresses before pick slips for domestic shipping addresses. The system considers the address a foreign address if the country on the shipping address does not match the [Default Country for Customer Address \(B17\)](#).
- If the [Sort Picks by Foreign/Domestic Flag \(D54\)](#) system control value is unselected, the system does not consider the shipping destination in the pick slip sort.



Note:

Streamlined pick slip generation does not generate printable pick slips if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Non-inventory items: The system prints a non-inventory item ((the *Non-inventory* field for the item is selected and the *Affect inventory* field for the Pick Control Detail record is set to N) that is NOT identified as a virtual stored value card or membership item on a pick slip when it is eligible based on the pick slip generation criteria in any of the following situations:

- It is the only item on the order.
- The order includes inventory items that are printing on the same pick slip.
- The order includes inventory items that are printing on another pick slip in the same pick slip generation run.
- the order includes only other non-inventory items (no inventory items), but at least one of these items is a virtual stored value card or membership item.

- The order includes inventory items, but they have already been picked, cancelled, or closed in some other way.

If you specify a location for a non-inventory item, this location prints on the pick slip; but, the system does not include this location in the warehouse zones or picking sequence array used for the pick slip sort within a pick slip PDF document.

For more information: See:

- [Simplified Pick Slip Sort](#) to review how the system sorts pick slips within a pick document when the [Sort Pick Slips by Gift Flag \(D53\)](#) and [Sort Picks by Foreign/Domestic Flag \(D54\)](#) system control values are unselected.
- [Gift Flag Pick Slip Sort](#) to review how the system sorts pick slips within a pick document when the [Sort Pick Slips by Gift Flag \(D53\)](#) system control value is selected and the [Sort Picks by Foreign/Domestic Flag \(D54\)](#) system control value is unselected.
- [Shipping Destination Pick Slip Sort](#) to review how the system sorts pick slips within a pick document when the [Sort Pick Slips by Gift Flag \(D53\)](#) system control value is unselected and the [Sort Picks by Foreign/Domestic Flag \(D54\)](#) system control value is selected.
- [Gift Flag and Shipping Destination Pick Slip Sort](#) to review how the system sorts pick slips within a pick document when the [Sort Pick Slips by Gift Flag \(D53\)](#) and [Sort Picks by Foreign/Domestic Flag \(D54\)](#) system control values are selected.

Simplified Pick Slip Sort

If the [Sort Pick Slips by Gift Flag \(D53\)](#) and [Sort Picks by Foreign/Domestic Flag \(D54\)](#) system control values are unselected, the system sorts the pick slips within a pick document in the following order.

1. Single line pick slips.
2. Multi line pick slips.

If more than one pick slip meets a sort level, the system sorts the pick slips:

1. Alphabetically by the warehouse zones defined in the *Zone 1*, *Zone 2*, *Zone 3*, *Zone 4*, *Zone 5* and *Zone 6* fields in the Pick Sort GH table.
2. Alphabetically by picking sequence array. See [Populating the Picking Sequence Array Field in the Pick Sort GH table](#) for more information on how the system updates the *Picking sequence array* field in the Pick Control Header Extended table and Pick Sort GH table during pick slip allocation.

Single line only pick slip example: The system generates the following pick slips.

Pick Slip	Pick Line	Warehouse Zone	Picking Sequence Array
1	1	P	0000007
2	1	M	0000010
3	1	A	0000012
4	1	P	0000008
5	1	M	0000009
6	1	A	0000011

In this example, the system sorts the pick slips in the pick document in the following order:

Pick Slip	Warehouse Zone	Picking Sequence Array
6	A	0000011
3	A	0000012
5	M	0000009
2	M	0000010
1	P	0000007
4	P	0000008

Multi line only pick slip example: The system generates the following pick slips.

Pick Slip	Pick Line	Warehouse Zones	Picking Sequence Array
1	1	A	00000110000012
	2		
2	1	A	00000100000012
	2	M	
3	1	A	00000090000012
	2	M	
4	1	A	00000100000011
	2	M	
5	1	M	00000090000011
	2	A	
6	1	M	00000090000010
	2		

In this example, the system sorts the pick slips in the pick document in the following order:

Pick Slip	Warehouse Zones Alphabetically	Picking Sequence Array
1	A	00000110000012
5	AM	00000090000011
3	AM	00000090000012
4	AM	00000100000011
2	AM	00000100000012
6	M	00000090000010

Single and multi line pick slip example: The system generates the following pick slips.

Pick Slip	Pick Line	Warehouse Zones	Picking Sequence Array
1	1	A	00000110000012
	2		
2	1	A	00000100000012
	2	M	

Pick Slip	Pick Line	Warehouse Zones	Picking Sequence Array
3	1	A	0000012
4	1	A	00000100000011
	2	M	
5	1	M	0000009
6	1	M	00000090000010
	2	M	

In this example, the system sorts the pick slips in the pick document in the following order:

Pick Slip	Single Line?	Warehouse Zones Alphabetically	Picking Sequence Array
3	Y	A	0000012
5	Y	M	0000009
1	N	A	00000110000012
4	N	AM	00000100000011
2	N	AM	00000100000012
6	N	M	00000090000010



Note:

Streamlined pick slip generation does not generate printable pick slips if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Gift Flag Pick Slip Sort

If the Sort Pick Slips by Gift Flag (D53) system control value is selected and the Sort Picks by Foreign/Domestic Flag (D54) system control value is unselected, the system sorts the pick slips within a pick document in the following order.

1. Single line pick slips for gift orders.
2. Multi line pick slips for gift orders.
3. Single line pick slips for non-gift orders.
4. Multi line pick slips for non-gift orders.

If more than one pick slip meets a sort level, the system sorts the pick slips:

1. Alphabetically by the warehouse zones defined in the *Zone 1*, *Zone 2*, *Zone 3*, *Zone 4*, *Zone 5* and *Zone 6* fields in the Pick Sort GH table.
2. Alphabetically by picking sequence array. See [Populating the Picking Sequence Array Field in the Pick Sort GH table](#) for more information on how the system updates the *Picking sequence array* field in the Pick Control Header Extended table and Pick Sort GH table during pick slip allocation.

Single line gift flag example: The system generates the following pick slips.

Pick Slip	Gift?	Pick Line	Warehouse Zone	Picking Sequence Array
1	Y	1	P	0000007
2	N	1	M	0000010
3	Y	1	A	0000012
4	Y	1	P	0000008
5	N	1	M	0000009
6	N	1	A	0000011

In this example, the system sorts the pick slips in the pick document in the following order:

Pick Slip	Gift?	Warehouse Zone	Picking Sequence Array
3	Y	A	0000012
1	Y	P	0000007
4	Y	P	0000008
6	N	A	0000011
5	N	M	0000009
2	N	M	0000010

Multi line gift flag example: The system generates the following pick slips.

Pick Slip	Gift?	Pick Line	Warehouse Zones	Picking Sequence Array
1	N	1	A	00000110000012
		2		
2	N	1	A	00000100000012
		2	M	
3	N	1	A	00000090000012
		2	M	
4	Y	1	A	00000100000011
		2	M	
5	N	1	M	00000090000011
		2	A	
6	Y	1	M	00000090000010
		2		

In this example, the system sorts the pick slips in the pick document in the following order:

Pick Slip	Gift?	Warehouse Zones Alphabetically	Picking Sequence Array
4	Y	AM	00000100000011
6	Y	M	00000090000010
1	N	A	00000110000012
5	N	AM	00000090000011

Pick Slip	Gift?	Warehouse Zones Alphabetically	Picking Sequence Array
3	N	AM	00000090000012
2	N	AM	00000100000012

Single and multi line gift flag example: The system generates the following pick slips.

Pick Slip	Gift?	Pick Line	Warehouse Zones	Picking Sequence Array
1	N	1	A	00000110000012
		2		
2	N	1	A	00000100000012
		2	M	
3	N	1	A	0000012
4	N	1	A	00000100000011
		2	M	
5	Y	1	M	0000009
6	Y	1	M	00000090000010
		2	M	

In this example, the system sorts the pick slips in the pick document in the following order:

Pick Slip	Gift?	Single Line?	Warehouse Zones Alphabetically	Picking Sequence Array
5	Y	Y	M	0000009
6	Y	N	M	00000090000010
3	N	Y	A	0000012
1	N	N	A	00000110000012
4	N	N	AM	00000100000011
2	N	N	AM	00000100000012



Note:

Streamlined pick slip generation does not generate printable pick slips if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Shipping Destination Pick Slip Sort

If the Sort Pick Slips by Gift Flag (D53) system control value is unselected and the Sort Picks by Foreign/Domestic Flag (D54) system control value is selected, the system sorts the pick slips within a pick document in the following order.

1. Single line pick slips with a foreign shipping address.
2. Multi line pick slips with a foreign shipping address.

3. Single line pick slips with a domestic shipping address.
4. Multi line pick slips with a domestic shipping address.

If more than one pick slip meets a sort level, the system sorts the pick slips:

1. Alphabetically by the warehouse zones defined in the *Zone 1*, *Zone 2*, *Zone 3*, *Zone 4*, *Zone 5* and *Zone 6* fields in the Pick Sort GH table.
2. Alphabetically by picking sequence array. See [Populating the Picking Sequence Array Field in the Pick Sort GH table](#) for more information on how the system updates the *Picking sequence array* field in the Pick Control Header Extended table and Pick Sort GH table during pick slip allocation.

Single line foreign ship example: The system generates the following pick slips.

Pick Slip	Foreign?	Pick Line	Warehouse Zone	Picking Sequence Array
1	Y	1	P	0000007
2	N	1	M	0000010
3	Y	1	A	0000012
4	Y	1	P	0000008
5	N	1	M	0000009
6	N	1	A	0000011

In this example, the system sorts the pick slips in the pick document in the following order:

Pick Slip	Foreign?	Warehouse Zone	Picking Sequence Array
3	Y	A	0000012
1	Y	P	0000007
4	Y	P	0000008
6	N	A	0000011
5	N	M	0000009
2	N	M	0000010

Multi line foreign ship example: The system generates the following pick slips.

Pick Slip	Foreign?	Pick Line	Warehouse Zones	Picking Sequence Array
1	N	1	A	00000110000012
		2		
2	N	1	A	00000100000012
		2	M	
3	N	1	A	00000090000012
		2	M	
4	Y	1	A	00000100000011
		2	M	
5	N	1	M	00000090000011
		2	A	

Pick Slip	Foreign?	Pick Line	Warehouse Zones	Picking Sequence Array
6	Y	1 2	M	00000090000010

In this example, the system sorts the pick slips in the pick document in the following order:

Pick Slip	Foreign?	Warehouse Zones Alphabetically	Picking Sequence Array
4	Y	AM	00000100000011
6	Y	M	00000090000010
1	N	A	00000110000012
5	N	AM	00000090000011
3	N	AM	00000090000012
2	N	AM	00000100000012

Single and multi line foreign ship example: The system generates the following pick slips.

Pick Slip	Foreign?	Pick Line	Warehouse Zones	Picking Sequence Array
1	N	1 2	A	0000011000001 2
2	N	1 2	A M	0000010000001 2
3	N	1	A	0000012
4	N	1 2	A M	0000010000001 1
5	Y	1	M	0000009
6	Y	1 2	M M	00000090000001 0

In this example, the system sorts the pick slips in the pick document in the following order:

Pick Slip	Single Line?	Foreign?	Warehouse Zones Alphabetically	Picking Sequence Array
5	Y	Y	M	0000009
6	N	Y	M	00000090000010
3	Y	N	A	0000012
1	N	N	A	00000110000012
4	N	N	AM	00000100000011
2	N	N	AM	00000100000012

**Note:**

Streamlined pick slip generation does not generate printable pick slips if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Gift Flag and Shipping Destination Pick Slip Sort

If the Sort Pick Slips by Gift Flag (D53) and Sort Picks by Foreign/Domestic Flag (D54) system control values are selected, the system sorts the pick slips within a pick document in the following order.

1. Single line pick slips for gift orders with a foreign shipping address.
2. Multi line pick slips for gift orders with a foreign shipping address.
3. Single line pick slips for gift orders with a domestic shipping address.
4. Multi line pick slips for gift orders with a domestic shipping address.
5. Single line pick slips for non-gift orders with a foreign shipping address.
6. Multi line pick slips for non-gift orders with a foreign shipping address.
7. Single line pick slips for non-gift orders with a domestic shipping address.
8. Multi line pick slips for non-gift orders with a domestic shipping address.

If more than one pick slip meets a sort level, the system sorts the pick slips:

1. Alphabetically by the warehouse zones defined in the *Zone 1*, *Zone 2*, *Zone 3*, *Zone 4*, *Zone 5* and *Zone 6* fields in the Pick Sort GH table.
2. Alphabetically by picking sequence array. See [Populating the Picking Sequence Array Field in the Pick Sort GH table](#) for more information on how the system updates the *Picking sequence array* field in the Pick Control Header Extended table and Pick Sort GH table during pick slip allocation.

Single line gift flag and foreign ship example: The system generates the following pick slips.

Pick Slip	Gift?	Foreign?	Pick Line	Warehouse Zone	Picking Sequence Array
1	Y	N	1	P	0000007
2	N	Y	1	M	0000010
3	Y	N	1	A	0000012
4	Y	N	1	P	0000008
5	N	N	1	M	0000009
6	N	N	1	A	0000011
7	N	Y	1	P	0000008
8	Y	Y	1	P	0000008

In this example, the system sorts the pick slips in the pick document in the following order:

Pick Slip	Gift?	Foreign?	Warehouse Zone	Picking Sequence Array
8	Y	Y	P	0000008
3	Y	N	A	0000012
1	Y	N	P	0000007
4	Y	N	P	0000008
2	N	Y	M	0000010
7	N	Y	P	0000008
6	N	N	A	0000011
5	N	N	M	0000009

Multi line gift flag and foreign ship example: The system generates the following pick slips.

Pick Slip	Gift?	Foreign?	Pick Line	Warehouse Zones	Picking Sequence Array
1	N	N	1	A	000001100000
			2		12
2	N	Y	1	A	000001000000
			2	M	12
3	N	N	1	A	000000900000
			2	M	12
4	Y	N	1	A	000001000000
			2	M	11
5	N	N	1	M	000000900000
			2	A	11
6	Y	N	1	M	000000900000
			2		10
7	N	Y	1	A	000000900000
			2	M	12
8	Y	Y	1	A	000001000000
			2	M	12

In this example, the system sorts the pick slips in the pick document in the following order:

Pick Slip	Gift?	Foreign?	Warehouse Zones Alphabetically	Picking Sequence Array
8	Y	Y	AM	00000100000012
4	Y	N	AM	00000100000011
6	Y	N	M	00000090000010
7	N	Y	AM	00000090000012
2	N	Y	AM	00000100000012
1	N	N	A	00000110000012
5	N	N	AM	00000090000011

Pick Slip	Gift?	Foreign?	Warehouse Zones Alphabetically	Picking Sequence Array
3	N	N	AM	00000090000012

Single and multi line gift flag and foreign ship example: The system generates the following pick slips.

Pick Slip	Gift?	Foreign?	Pick Line	Warehouse Zones	Picking Sequence Array
1	N	N	1	A	000001100000
			2		12
2	N	Y	1	A	000001000000
			2	M	12
3	N	N	1	A	0000012
4	N	N	1	A	000001000000
			2	M	11
5	Y	N	1	M	0000009
6	Y	Y	1	M	000000900000
			2	M	10

In this example, the system sorts the pick slips in the pick document in the following order:

Pick Slip	Single?	Gift?	Foreign?	Warehouse Zones Alphabetically	Picking Sequence Array
6	N	Y	Y	M	000000900000
					10
5	Y	Y	N	M	0000009
2	N	N	Y	AM	000001000000
					12
3	Y	N	N	A	0000012
1	N	N	N	A	000001100000
					12
4	N	N	N	AM	000001000000
					11



Note:

Streamlined pick slip generation does not generate printable pick slips if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Using Cart/Bin Picking

Overview: Cart/bin picking generates a batch pick slip list for one picker to handle in a single pick slip run.

Cart/bin picking:

- Groups items together for picking by determining the total number of items that can fit on a single picking cart.
- Generates a [Cart/Bin Batch Picking Pullsheet](#) for each cart, and a [Cart Batch Recap](#) for the pick slip run.
- Sorts and groups pick slips by cart batch number. See [Sorting Pick Slips into Separate Cart Batches](#).

**Note:**

Streamlined pick slip generation does not generate cart/bin batches if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Cart/Bin Picking Setup

In order to use cart/bin picking, you must complete the following information.

Cube factor of item: Enter a *Cube factor* for the item on the [Create Item Screen](#). You can also enter a *Cube factor* for the SKU on the [Create SKU 2 of 2 \(With Overrides\) Screen](#). The cube factor for the SKU overrides the cube factor for the item. The system uses this value to determine the cube size of the pick slip. See [Determining the Weight and Cube of the Pick Slip](#).

System control values: Complete the system control values that display on the [Edit Cart/Bin Values Screen \(B38\)](#).

System Control Value	Description
Use Cart/Bin Picking? (B38)	Must be selected in order to use cart/bin picking.
Sort Picks by Pick Sequence (E89)	If selected, the system includes the <i>Picking sequence array</i> field in the Pick Sort GH table when sorting pick slips in a batch. See Pick Slip Sort Within a Cart Batch .
Cube of Bin (B44)	Enter the cubic volume of the smallest bin within a cart.
Cube of Cart (B42)	Enter the total cubic volume of the cart. The system adds pick slips to a cart batch until adding another pick slip will cause the cube total for the cart batch to go over the Cube of Cart (B42) .
Minimum Number of Picks in a Cart (B47)	Enter the minimum number of picks that can fit in a cart. Example: • If you define the minimum number of picks as 20, each batch must contain at least 20 pick slips. • If the next batch to be created has only 15 picks, the 15 pick slips are added to the batch, rather than creating a new batch of 15 pick slips, because it is less than the required minimum of 20. • If the number of picks to be batched is less than the quantity you entered, the picks are added to the current batch instead of creating a new batch that would be less than the minimum size.

System Control Value	Description
Maximum Number of Single Line Picks (B39)	Enter the maximum number of single line pick slips to include in a single batch. Example: If you enter 12, and the number of single line pick slips generated in a pick run is 15, the system creates 2 cart batches. The first cart batch has 12 single line pick slips and the second cart batch has the remaining 3 single line pick slips.
Maximum Number of Multi Line Picks (B40)	Enter the maximum number of multi-line pick slips to include in each batch. Example: If you enter 12, and the number of multi line pick slips generated in a pick run is 15, the system creates 2 cart batches. The first cart batch has 12 multi line pick slips and the second cart batch has the remaining 3 multi line pick slips.
Maximum Number of Zones (B41)	Enter the maximum number of zones (up to six) allowed on a multi-line pick slip before generating another batch.

**Note:**

All cubing dimensions for evaluating cubic value of items, carts, and batches should be rendered in the same unit of measure throughout the system, whether you use inches, feet, or a point rating.

Examples of Cart/Bin Picking with Cubing and without Cubing**Example 1: Cart bin picking with cubing****Criteria:**

- Total cube for batch = 31,000
- Total number of orders in batch = 10
- Minimum bin size = 3,000
- Total number of multi-line picks = 5
- Break single line picks by zone = Selected

Explanation:

Using the criteria, the system performs cubing and separates the single line picks from the multi-line picks. Within this grouping, the picks are further grouped by zone or by pick sequence number depending on the value entered in the [Sort Picks by Pick Sequence \(E89\)](#) system control value. In compiling each batch, the program accumulates the total cubic measurement for each line. When it has reached a total cube of 31,000 or ten single line picks, it creates a batch. The program continues to do this until all single line picks are written to the Pick Slip Print table. The program then does the same with the multi-line picks (using 5 picks or 31,000 cube for total batch limits) until all picks are exhausted.

Example 2: Cart bin picking without cubing**Criteria:**

- Total cube for batch = 30,000
- Total number of orders in batch = 10
- Minimum, bin size = 3,000

Explanation:

Using the criteria, the system sorts the orders by warehouse zone or by pick sequence number depending on the value entered in the [Sort Picks by Pick Sequence \(E89\)](#) system control value. In compiling the orders for a single batch, the system accumulates the total cube for the orders. The accumulated cube and the number of orders is evaluated against the system control values. Once the program reaches either an accumulated cube of 30,000 or ten orders, it creates a batch. The number of bins to be used on the cart would be determined by dividing the minimum bin size of 3,000 into the total cube for the order. The system may only assign five orders to a batch based on the cube; only 5 bins would be needed.

Sorting Pick Slips into Separate Cart Batches

The system uses the [Sorted Pick Sort GH Table](#) to determine how to sort the pick slips into separate cart batches. The system creates a new cart batch for the following reasons.

#	Step
1.	The <i>Warehouse</i> in the Pick Sort GH table changes.
2.	Within warehouse, the <i>Ship Via Priority</i> in the Pick Sort GH table changes. The system sorts the pick slips in descending ship via priority order. For example, the system creates a cart batch for ship via priority 5 before creating a cart batch for ship via priority 1.
3.	The <i>Generation type</i> in the Pick Control Header table changes.
4.	The <i>Gift Pick</i> in the Pick Sort GH table changes from Y to N or blank. Y displays in this field if the <i>Gift</i> flag on the Order Ship To record is Y.
5.	The <i>Foreign Country</i> in the Pick Sort GH table changes from Y to N or blank. Y displays in this field if the country on the shipping address does not match the Default Country for Customer Address (B17) .
6.	The <i>Single Line</i> in the Pick Sort GH table changes from Y to N or blank. Y displays in this field if the pick slip has 1 pick slip line.
7.	The total cubic volume of the cart (defined in the Cube of Cart (B42) system control value) is reached. The system uses the following calculations to determine the total cubic volume of a cart. # of bins used calculation: The system calculates the number of bins used for a pick slip as follows: $(\text{Cube of pick slip from Pick Sort GH table} / \text{Cube of Bin (B44) value}) + .99 = \text{Number of Bins Used}$ NOTE: If the # of bins used calculation results in a value that is less than or equal to 0, the system updates the # of bins used for a pick slip to 1. Cube total for pick slip calculation: The system calculates the cube total for a pick slip as follows: $\text{Summation of (Number of Bins Used * Cube of Bin (B44) value)} = \text{Cube Total for Pick Slip}$ The system adds pick slips to a cart batch until adding another pick slip will cause the cube total for the cart batch to go over the Cube of Cart (B42) value. At that point, the system creates a new cart batch. See Cart Batch Example: Total Cubic Volume of Cart Reached for an example.
8.	The number of single line pick slips reaches the Maximum Number of Single Line Picks (B39) allowed. See Cart Batch Example: Maximum Pick Slips in a Batch Reached for an example.

#	Step
9.	The number of multi line pick slips reaches the Maximum Number of Multi Line Picks (B40) allowed. See Cart Batch Example: Maximum Pick Slips in a Batch Reached for an example.
10.	The <i>Special handling sts</i> in the Pick Sort GH table changes from Y to N or blank. Y displays in this field if the pick slip has a line that requires special handling.
11.	For multi line pick slips, the zone combination defined in the <i>Zone 1, Zone 2, Zone 3, Zone 4, Zone 5</i> and <i>Zone 6</i> fields in the Pick Sort GH table changes. Maximum number of zones for multi line pick slips: If the number of zones defined for a pick slip is greater than the Maximum Number of Zones (B41) , the system updates the <i>Zone</i> fields in the Pick Sort GH table with asterisks (*) instead of the zone code. In this situation, the system sorts these pick slips to the top of the list and places these pick slips in the same cart batch. See Cart Batch Example: Maximum Number of Zones Reached for an example.
12.	For single line pick slips, if the Break Single Line Picks by Zone (E33) system control value is selected, the zone defined in the <i>Zone 1</i> field in the Pick Sort GH table changes. For example, the system sorts pick slips for zone A into one cart batch and sorts pick slips for zone B into a separate cart batch.

When the system creates a new cart batch, the system:

- Uses the [Cart Batch #](#) number assignment wheel to assign the next cart batch number.

 Note:

The *End #* for this number assignment wheel should be 3 so that the system restarts the cart batch # at 1 once a cart batch # of 999 has been reached.

- Restarts the bin # at 1. You can have up to 999 bins in a cart batch.

Once the system determines how many cart batches to generate, the system determines how to sort the pick slips within the cart batch; see [Pick Slip Sort Within a Cart Batch](#).

Sorting Pick Slips into Cart Batches When Not Using Cart/Bin Picking

If the [Use Cart/Bin Picking? \(B38\)](#) system control value is unselected, the system:

1. Creates a cart batch # of 1.
2. Assigns a bin # of 1 to the first pick slip in the [Sorted Pick Sort GH Table](#).
3. Continues adding pick slips to cart batch # 1 until the bin # reaches 999.
4. Once the bin # reaches 999, the system creates cart batch # 2 and repeats steps 2 and 3 until all of the pick slips in the pick generation run have been assigned a cart batch # and bin #.

 Note:

Streamlined pick slip generation does not generate cart/bin batches if the *Bypass Creation of Pick Forms during WSPS Pick Generation (K55)* system control value is selected.

Cart Batch Example: Sorting Pick Slips into Separate Batches

You generate the following pick slips for a pick generation run. In this example, each pick slip in the run has the same warehouse, generation type, and special handling status. Also:

- The total cubic volume for a cart (defined in the Cube of Cart (B42) system control value) has not been reached. See [Cart Batch Example: Total Cubic Volume of Cart Reached](#) for an example.
- The item(s) for each pick slip is located in zone A. See [Cart Batch Example: Maximum Number of Zones Reached](#) for an example.
- The Maximum Number of Single Line Picks (B39) and Maximum Number of Multi Line Picks (B40) has not been reached. See [Cart Batch Example: Maximum Pick Slips in a Batch Reached](#) for an example.

Pick Slip	Whs	Ship Via Priority	Gift Pick	Foreign Country	Single Line?
1	1	5	N	N	N
2	1	1	Y	Y	Y
3	1	5	N	N	Y
4	1	5	N	Y	Y
5	1	1	N	N	N
6	1	1	Y	Y	Y
7	1	5	N	Y	Y
8	1	5	Y	Y	Y

In this example, the system sorts the pick slips into the following cart batches:

Cart Batch	Pick Slip	Whs	Ship Via Priority	Gift Pick	Foreign Country	Single Line?
1	8	1	5	Y	Y	Y
2	4 7	1	5	N	Y	Y
3	3	1	5	N	N	Y
4	1	1	5	N	N	N
5	2 6	1	1	Y	Y	Y
6	5	1	1	N	N	N



Note:

Streamlined pick slip generation does not generate cart/bin batches if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Cart Batch Example: Total Cubic Volume of Cart Reached

You generate the following pick slips for a pick generation run. In this example, each pick slip in the run has the same warehouse, ship via priority, generation type, gift pick setting, foreign setting, and special handling status. Also:

- The items for each pick slip are located in zone A. See [Cart Batch Example: Maximum Number of Zones Reached](#) for an example.
- Each pick slip has multiple lines and the Maximum Number of Multi Line Picks (B40) has not been reached. See [Cart Batch Example: Maximum Pick Slips in a Batch Reached](#) for an example.
- The Cube of Bin (B44) is 2.
- The Cube of Cart (B42) is 16

The [Sorted Pick Sort GH Table](#) sorts the pick slips into the following order:

Pick Slip	Cube of Pick Slip
1481	9
1483	5
1476	4
1478	7
1479	6
1482	11
1480	16

The system calculates the number of bins used for each pick slip.

(Cube of pick slip from Pick Sort GH table / Cube of Bin (B44) value) + .99 = Number of Bins Used

Pick Slip	Calculation	# of Bins Used
1481	$(9 / 2) + .99 = 5.49$	5
1483	$(5 / 2) + .99 = 3.49$	3
1476	$(4 / 2) + .99 = 2.99$	2
1478	$(7 / 2) + .99 = 4.49$	4
1479	$(6 / 2) + .99 = 3.99$	3
1482	$(11 / 2) + .99 = 6.49$	6
1480	$(16 / 2) + .99 = 8.99$	8

The system calculates the cube total for each pick slip.

Summation of (Number of Bins Used * Cube of Bin (B44) value) = Cube Total for a Cart Batch

Pick Slip	# of Bins Used	Calculation	Cube Total for Pick Slip
1481	5	$5 \times 2 = 10$	10
1483	3	$3 \times 2 = 6$	6
1476	2	$2 \times 2 = 4$	4
1478	4	$4 \times 2 = 8$	8
1479	3	$3 \times 2 = 6$	6
1482	6	$6 \times 2 = 12$	12
1480	8	$8 \times 2 = 16$	16

The system adds pick slips to a cart batch until adding another pick slip will cause the cube total for the cart batch to go over the value in the Cube of Cart (B42) system control value. In this example, because the Cube of Cart (B42) is 16, the system sorts the pick slips into the following cart batches:

Cart Batch	Pick Slips	Batch Cube Total	Cube Total for Cart Batch
1	1481	10	16
	1483	6	
2	1476	4	12
	1478	8	
3	1479	6	6
4	1482	12	12
5	1480	16	16

**Note:**

Streamlined pick slip generation does not generate cart/bin batches if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Cart Batch Example: Maximum Pick Slips in a Batch Reached

You generate the following pick slips for a pick generation run. In this example, each pick slip in the run has the same warehouse, ship via priority, generation type, gift pick setting, foreign setting, and special handling status. Also:

- The total cubic volume for a cart (defined in the Cube of Cart (B42) system control value) has not been reached. See [Cart Batch Example: Total Cubic Volume of Cart Reached](#) for an example.
- The item(s) for each pick slip is located in zone A. See [Cart Batch Example: Maximum Number of Zones Reached](#) for an example.
- The Maximum Number of Single Line Picks (B39) is 4.
- The Maximum Number of Multi Line Picks (B40) is 2.

Pick Slip	Single Line?
1	Y
2	Y
3	N
4	Y
5	N
6	Y
7	Y
8	N

In this example, the system sorts the pick slips into the following cart batches:

Cart Batch	Pick Slip	Single Line?
1	1	Y
	2	
	4	
	6	
2	7	Y
3	3	N
	5	
4	8	N



Note:

Streamlined pick slip generation does not generate cart/bin batches if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Cart Batch Example: Maximum Number of Zones Reached

You generate the following pick slips for a pick generation run. In this example, each pick slip in the run has multiple lines, the same warehouse, ship via priority, generation type, gift pick setting, foreign setting, and special handling status. Also:

- The total cubic volume for a cart (defined in the Cube of Cart (B42) system control value) has not been reached. See [Cart Batch Example: Total Cubic Volume of Cart Reached](#) for an example.
- Each pick slip has multiple lines and the Maximum Number of Multi Line Picks (B40) has not been reached. See [Cart Batch Example: Maximum Number of Zones Reached](#) for an example.
- The Maximum Number of Zones (B41) system control value is 3.

Pick Slip	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
1	A	M				
2	A	C	M			
3	A	C	D	M	S	
4	A	M				
5	C	D	M			
6	A	M				
7	C	M				
8	C	D	M			
9	C	D	M	S		
10	A	C	M	S		

In this example, the system sorts pick slips into the following cart batches:

Cart Batch	Pick Slip	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
1	3	*	*	*	*	*	*
	9						
	10						
	Note: Because pick slips 3, 9 and 10 contain more zones than the <i>Maximum Number of Zones (B41)</i> allowed, the system updates the <i>Zone</i> fields in the Pick Sort GH table with asterisks (*). The system sorts pick slips with asterisks in the <i>Zone</i> fields to the top of the list and places them in the same cart batch number.						
2	2	A	C	M			
3	1	A	M				
	4						
	6						
4	5	C	D	M			
	8						
6	7	C	M				

**Note:**

Streamlined pick slip generation does not generate cart/bin batches if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Pick Slip Sort Within a Cart Batch

The system sorts the pick slips within a cart batch in the following order.

1. Alphabetically by the warehouse zones defined in the *Zone 1*, *Zone 2*, *Zone 3*, *Zone 4*, *Zone 5* and *Zone 6* fields in the Pick Sort GH table.
2. Alphabetically by picking sequence array. See [Populating the Picking Sequence Array Field in the Pick Sort GH table](#) for more information on how the system updates the *Picking sequence array* field in the Pick Control Header Extended table and Pick Sort GH table during pick slip allocation.

Single line only cart batch example: The system sorts the following pick slips into a single cart batch.

Pick Slip	Pick Line	Warehouse Zone	Picking Sequence Array
1	1	P	0000007
2	1	M	0000010
3	1	A	0000012
4	1	P	0000008
5	1	M	0000009
6	1	A	0000011

In this example, the system sorts the pick slips in the cart batch in the following order:

Pick Slip	Warehouse Zone	Picking Sequence Array
6	A	0000011
3	A	0000012
5	M	0000009
2	M	0000010
1	P	0000007
4	P	0000008

Multi line only cart batch example: The system sorts the following pick slips into a single cart batch.

Pick Slip	Pick Line	Warehouse Zones	Picking Sequence Array
1	1	A	00000110000012
	2		
2	1	A	00000100000012
	2	M	
3	1	A	00000090000012
	2	M	
4	1	A	00000100000011
	2	M	
5	1	M	00000090000011
	2	A	
6	1	M	00000090000010
	2		

In this example, the system sorts the pick slips in the cart batch in the following order:

Pick Slip	Warehouse Zones	Picking Sequence Array
1	A	00000110000012
5	AM	00000090000011
3	AM	00000090000012
4	AM	00000100000011

Pick Slip	Warehouse Zones	Picking Sequence Array
2	AM	00000100000012
6	M	00000090000010

**Note:**

Streamlined pick slip generation does not generate cart/bin batches if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Generating and Printing Pick Slips

How to generate pick slips: You can accept the criteria that were entered by selecting Generate Picks for a pick slip generation template and selecting OK at the Work with Streamlined Pick Slip Generation Screen. The system submits a batch job (PICK_GEN) to generate the pick slips. By default, this job is submitted to the PICKGEN job queue at the [Job Management Screen](#) rather than the QBATCH job queue.

Updates: Once the pick slips have generated, the system:

- Updates the *Printed* field in the Pick Sort GH table to Y.
- Updates the *Pick status* field in the Pick Control Header table to M (Manifesting).
- Unlocks the order by clearing the *User* field in the Order Header table.

Pick slip form: The system generates each pick slip form as a PDF (portable document format) file, typically opened through the Adobe Reader or within a separate browser window. Each PDF file has one or more individual pick slip forms, based on the [Reasons to Sort Pick Slips into Separate PDF Documents](#).

Once the system finishes processing one pick slip PDF document, you can open and print the pick slips in the document using the [Forms Management \(My Forms\)](#); you do not have to wait until all of the PDF documents for the pick slip generation run have generated.

**Note:**

Streamlined pick slip generation does not generate cart/bin batches or printable pick slips if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Order Transaction History message: When it generates a pick slip, the system writes an Order Transaction History message:

- If the Use Cart/Bin Picking? (B38) system control value is selected and you are not using streamlined pick slip generation with the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value selected, the message includes the pick control number, warehouse number, cart batch number, billing batch number, and bin number, for example: Pk 1236612 Whs 1 Ct/Bn 1234734/411/1 where 1236612 is the pick slip number, 1 is the warehouse number, 1234734 is the billing batch number, 411 is the cart batch number and 1 is the cart bin number.

- Otherwise, the message includes the pick control number, warehouse number, and billing batch number, for example: `Pk 1236609 Whs 1 Batch # 1234731` where 1236609 is the pick slip number, 1 is the warehouse number, and 1234731 is the billing batch number.

You can review these messages at the [Display Order History Screen](#).

Picks not included? If you run pick slip generation and the system does not include the picks you were expecting, you can use [Pick Print Eligibility \(WPPE\)](#) to determine the reason why the picks were not included.

Generate invoice number during pick slip generation? If the Generate Invoice Number at Pick Gen (H80) or Generate Invoice # at Pick Gen without Address Match (K81) system control value is selected, the system might assign a pending invoice number during pick slip generation and writes this number to the Pick Control Header table.

Include printed drop ship items as backordered on pick slip? The system prints drop ship items as backordered on the pick slip if a drop ship pick slip or purchase order has not yet been generated for the drop ship item.

Also, if the [Add Printed Drop Ship Lines as Backordered on Pick \(E93\)](#) system control value is selected, the system prints drop ship items as backordered on the pick slip after a drop ship pick slip or purchase order has been generated for the drop ship item.

Include soldout lines on pick slip? The system prints soldout order lines on the first pick slip generated for an order if the *Soldout notifications* field for the order type on the order is selected.

Set items on picking documents: When printing pick slip documents for set items:

- [Pick Slip](#): The system prints the main set item and set component items on the pick slip. If the component items are flagged as ship alone items, a separate pick slip prints for each item included in the set with the message ***Other Items Shipped Separately***. However, the system will include the main set item with one of the component items in order to avoid printing the main set item on its own pick slip. The total for the set prints on one pick slip.
- [Cart/Bin Batch Picking Pullsheet](#): The system prints the main set item and set components on this report. The system includes the quantity of the main set item and the quantity of each component item in the *Total Units* field. For example, if the set item consists of 1 unit of component 1 and 2 units of component 2 and you order 2 sets, the system displays 8 in the *Total Units* field (2 main set items + 2 component 1 items + 4 component 2 items).
- [Batch Item Pull Label](#): The system prints a batch item pull label for the main set item and set component items.
- [Batch Pull Sheet Item Summary Report](#): The system prints the main set item and set component on this report. A location displays for the set component items, but not the main set item.
- [Pick Unit Report](#): The system includes the quantity of each component item in the *Units/All Picks* and *Units/Multi Line Picks* fields on this report.
- [Cart Batch Recap](#): The system includes the quantity of the main set item and the quantity of each component item in the *Qty* and *Items* fields on this report.

Prorate freight charges? If the [Prorate Freight Charges \(D39\)](#) system control value is unselected, the system charges all freight charges on an order with the first shipment; in this situation, all freight charges are added to the first pick slip generated for the order. If the [Prorate Freight Charges \(D39\)](#) system control value is selected, the system charges a proportional amount of freight for partial shipments on an order.

Available Pick Slip Generation Documents

Invalid data during pick slip generation: If an order in the pick slip generation run contains invalid data, such as an invalid source code, customer, or ship via code, the system does not generate a pick slip for the order. However, depending on the type of information that is invalid, the system may include the order on the following reports:

- [Batch Pull Sheet Item Summary Report](#)
- [Cart Batch Recap](#)
- [Pick Unit Report](#)

Pick Slip Generation Document	When It Prints
Pick Slip	If a print program is defined in the Pick Printing Program (C37) system control value, the system generates pick slips; however, streamlined pick slip generation does not generate printable pick slips if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected. See Generating and Printing Pick Slips for more information on how the system determines which pick slips to generate.
Picking Pullsheet	The system generates the Cart/Bin Batch Picking Pullsheet when you generate pick slips if you are Using Cart/Bin Picking (the Use Cart/Bin Picking? (B38) system control value is selected) and a print program has been defined in the Cart/Bin Batch Pull Sheet Printing Program (C39) system control value. The system generates the Picking Pullsheet when you generate pick slips if you are NOT Using Cart/Bin Picking (the Use Cart/Bin Picking? (B38) system control value is unselected) and a print program has been defined in the Use Cart/Bin Picking? (B38) system control value. NOTE: Streamlined pick slip generation does not generate this report if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.
Item Stock Allocation Error Report	The system generates this report when you generate pick slips if you have items on the orders which cannot be picked.
Batch Item Pull Label	The system prints a batch item pull label when you are Generating and Printing Pick Slips if a print program name has been defined in the Batch Item Pull Label Printing Program (F63) system control value. NOTE: Streamlined pick slip generation does not generate this report if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.
Batch Pull Sheet Item Summary Report	The system generates this report when you generate pick slips if system control value Print Batch Pull Sheet Item Summary (C59) is selected. NOTE: Streamlined pick slip generation does not generate this report if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.
Pick Unit Report	The system generates this report automatically when you generate pick slips. This report indicates the pick slip generation template used to generate the pick slips. NOTE: Streamlined pick slip generation does not generate this report if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.

Pick Slip Generation Document	When It Prints
Gift Acknowledgement	The system generates gift acknowledgments during pick slip generation if the Automatic Generation of Gift Acknowledgement (B92) system control value is set to P. NOTE: Streamlined pick slip generation does not generate this report if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.
Cart Batch Recap	The system produces this recap listing when you generate pick slips if you are Using Cart/Bin Picking . NOTE: Streamlined pick slip generation does not generate this report if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected.
Credit Card Authorization Listing	The system generates this report if you perform authorization during pick slip generation. The system produces two versions of the report: one includes declines, and one includes authorized pick slips; see Authorizations During Pick Slip Generation for an overview.
Address Verification Response List	The system generates this report if you perform authorization during pick slip generation.
Pick/Authorization Listing	The system generates this report if you perform authorization during pick slip generation.
Unmatched Reserved/Remaining Qty Report	The system generates this report during Streamlined Pick Slip Generation (WSPS) if: - The <i>Qty remaining</i> in the Reserved Order Line table is greater than the <i>Qty reserved</i> in the Order Detail table - the <i>Qty printed</i> in the Order Detail table, and - The <i>Qty printed</i> in the Reserved Order Line table is greater than the <i>Qty printed</i> in the Order Detail table.

Confirming and Billing Shipments

Topics in this part:

- [Manually Confirming Shipments \(MCON\)](#) describes how to confirm shipments manually, or interactively, using the pick control number, billing batch number (without exceptions), and billing batch number (with exceptions).
- [Reprinting and Voiding Pick Slips \(WVRP or WSVP\)](#) explains how to reprint and void a single pick slip or a range of pick slips.
- [Void Pick Batch \(WSVP\)](#)
- [Printing the Fill Rate Reports \(PFRR\)](#) provides report samples and descriptions of the Fill Rate, Shipment Summary, and Backorder Summary reports.

Drop Ship Pick Slip/Invoice

Purpose: The drop ship pick slip/invoice lists item and retail price information for a drop ship order.

How to print: The system generates the drop ship pick slip/invoice when you process drop ship pick slips or drop ship purchase orders at the Select Vendors for Drop Ship Screen. Purchase order receiving also generates a drop ship pick slip/invoice if the Print Drop Ship Invoice at time of Purchase Order Receiving (F10) system control value is selected.

Working with forms: See Forms Management (My Forms) for information on displaying or printing drop ship pick slips and other forms.

 Note:

The information presented here is included on your drop ship pick slip/invoice only if your print program supports it. The Drop Ship Pick Print Program (E92) system control value identifies the pick slip printing program to use for drop ship orders. The standard program for drop ship pick slips is the same as the standard program for regular pick slips (*PICKG* for the graphical pick slip). For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

Sample pick slip: See the [Pick Slip](#).

Contents: The INPUT_TYPE setting for your pick slip form in [Working with Customer Properties \(PROP\)](#) indicates the means by which your drop ship pick printing program obtains the data to print on the pick slip form. Each option is available only if your drop ship pick printing program supports it. Valid values are:

- XML = The program uses the Pick Message from Order Administration (CWPickOut) to generate the drop ship pick slip.
- DB = The program queries the database to generate the drop ship pick slip. The INPUT_TYPE setting for the standard printing program PICKG is DB.

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

Drop Ship Pick Slip Sold To Label (ORDERED By)	Comments
Logo	You can include a company logo or an entity logo. See Setting Up Company Logos for Forms and the Print Entity Image (K35) system control value for background and setup information.
Order Number and Ship To Number	The order number and the ship-to number, separated by a hyphen. The ship to number is set to 1 if there is only one shipping address. From the order_nbr and order_shipto_nbr attributes in the Pick Message from Order Administration (CWPickOut) or the <i>Order #</i> and <i>Ship to #</i> fields in the Pick Control Header table.
Barcode	Formatted as 012-0003702-02, where 012 is the company number, 0003702 is the pick control number, and 02 is the label number. The <i>BARCODE_IMAGE</i> value for the PICKG and PICKDBG (graphical pick slip) settings in Working with Customer Properties (PROP) controls whether the system prints a barcode on the drop ship pick slip. From the <i>CMP Company</i> , <i>PCH Control #</i> , and <i>PCL Label Number</i> fields in the Pick Control Label table.
Generation Date	The date the drop ship pick slip was generated. From the date_printed attribute in the V or the <i>PCH Date printed</i> field in the Pick Control Header table.

Drop Ship Pick Slip Sold To Label (ORDERED By)	Comments
Sold To sold to name and address	The sold-to name and address has the label ORDERED BY: and is enclosed in a rounded box on the base graphical drop ship pick slip. Includes the following: • Company name: The company name for the address of the sold to customer. From the sold_to_company attribute in the Pick Message from Order Administration (CWPickOut) or the <i>NAM Company name</i> field in the Customer Sold To table. • First name, middle initial, last name: The first name, middle initial, and last name of the sold to customer. From the sold_to_fname, sold_to_initial, and sold_to_lname attributes in the Pick Message from Order Administration (CWPickOut) or the <i>NAM First name</i>, <i>NAM Initial</i>, and <i>NAM Last name</i> fields in the Customer Sold To table. • Address line 1 and Apartment: The street address and apartment for the address of the sold to customer. From the sold_to_addr1 and sold_to_apartment attributes in the Pick Message from Order Administration (CWPickOut) or the <i>NAM Street address</i> and <i>NAM Apartment</i> fields in the Customer Sold To table. • Address line 2: The second address line for the address of the sold to customer. From the sold_to_addr2 attribute in the Pick Message from Order Administration (CWPickOut) or the <i>NAM Address line 2</i> field in the Customer Sold To table. •  Note: Address lines 3 and 4 do not print on the drop ship pick form. • City, state, postal code: The city, state code, and zip code for the address of the sold to customer. From the sold_to_city, sold_to_state, and sold_to_postal_code attributes in the Pick Message from Order Administration (CWPickOut) or the <i>NAM City</i>, <i>NAM State</i>, and <i>NAM Zip</i> fields in the Customer Sold To table. • Country description: The country name for the address of the sold to customer. From the sold_to_country_name attribute in the Pick Message from Order Administration (CWPickOut) or the <i>Country description</i> field in the Country table.  Note: The country name prints only if you are shipping to a country other than the default specified in the Default Country for Customer Address (B17) system control value.
Drop Ship Pick Slip Ship To Label Logo	A separate drop ship pick slip prints for each ship to customer on the order. See Setting Up Company Logos for Forms for setup information.

Drop Ship Pick Slip Sold To Label (ORDERED By)	Comments
Barcode	Formatted as 012-0003702-02, where 012 is the company number, 0003702 is the pick control number, and 01 is the label number. The <i>BARCODE_IMAGE</i> value for the PICKG and PICKDBG (graphical pick slip) settings in Working with Customer Properties (PROP) controls whether the system prints a barcode on the pick slip. From the <i>CMP Company</i>, <i>PCH Control #</i>, and <i>PCL Label Number</i> fields in the Pick Control Label table.
Order Number and Ship To Number	The order number and the ship-to number, separated by a hyphen. The ship to number is set to 1 if there is only one shipping address. From the <i>order_nbr</i> and <i>order_shipto_nbr</i> attributes in the Pick Message from Order Administration (CWPickOut) or the <i>Order #</i> and <i>Ship to #</i> fields in the Pick Control Header table.
Billing Batch Number and Cart Batch Number	The billing batch number assigned by the system to a group of pick slips and the cart batch number assigned to the pick slip. See Using Cart/Bin Picking. From the <i>billing_batch_nbr</i> and <i>cart_batch_nbr</i> attributes in the Pick Message from Order Administration (CWPickOut) or the <i>PCH Billing batch #</i> and <i>PCH Cart batch #</i> fields in the Pick Control Header table.

Drop Ship Pick Slip Sold To Label (ORDERED By)	Comments
Ship To ship to name and address	The ship to name and address can be an order-level shipping address, a permanent customer ship to address, a recipient sold to customer, or the sold to customer on the order. See Assigning an Order Shipping Address, Using a Permanent Shipping Address in Order Entry, Adding a Recipient Order in Order Entry, and Entering Orders for more information. Includes the following: • Company: The company name for the address of the ship to customer. From the <i>ship_to_company</i> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>NAM Company name</i> in the Pick Control Header table. • First name, middle initial, last name: The first name, middle initial, and last name of the ship to customer. From the <i>ship_to_fname</i>, <i>ship_to_initial</i>, and <i>ship_to_lname</i> attributes in the Pick Message from Order Administration (CWPickOut) or the <i>NAM First Name</i>, <i>NAM Initial</i>, and <i>NAM Last Name</i> fields in the Pick Control Header table. • Address line 1 and Apartment: The street address and apartment for the address of the ship to customer. From the <i>ship_to_addr1</i> and <i>ship_to_aprt</i> attributes in the Pick Message from Order Administration (CWPickOut) or the <i>NAM Street Address</i> and <i>NAM Apartment</i> fields in the Pick Control Header table. • Address line 2: The second address line for the address of the ship to customer. From the <i>ship_to_addr2</i> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>NAM Address Line 2</i> field in the Pick Control Header table. • NOTE: Address lines 3 and 4 do not print on the drop ship pick form. • City, state, postal code: The city, state code, and zip code for the address of the ship to customer. From the <i>ship_to_city</i>, <i>ship_to_state</i>, and <i>ship_to_postal_code</i> attributes in the Pick Message from Order Administration (CWPickOut) or the <i>NAM City</i>, <i>NAM State</i>, and <i>NAM Postal Code Scan</i> fields in the Pick Control Header table. • Country description: The country name for the address of the ship to customer. From the <i>ship_to_country_name</i> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>Country description</i> field in the Country table. NOTEThe country description prints only if you are shipping to a country other than the default specified in the Default Country for Customer Address (B17) system control value. If the Default Country for Customer Address (B17) system control value is blank and the country for the ship to address is the United States of America, the system truncates the country to United States of
Generation Date	The date the pick slip was generated. From the <i>date_printed</i> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>PCH Date printed</i> field in the Pick Control Header table.
Customer #	The number assigned by the system to identify the sold-to customer on the order. From the <i>sold_to_customer_nbr</i> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>CST Customer #</i> field in the Pick Control Header table.

Drop Ship Pick Slip Sold To Label (ORDERED By)	Comments
Ship Via Description	The first 10 positions of the ship via description, such as UPS or Fed Ex. From the ship_via_desc attribute in the Pick Message from Order Administration (CWPickOut) or the <i>VIA Shipper Name</i> field in the Ship Via table.
Order Level Message	The first four order level messages on the order whose <i>Print</i> flag is set to Print on Both or Print on Picks. See the Work with Order Messages Screen for more information on order level messages. From the msg attribute in the Pick Message from Order Administration (CWPickOut) for msg_type OH or the <i>OMS Message</i> field in the Order Message table.
Drop Ship Pick Slip Header Information	
Date Of Order	The date the order was placed. From the order_date attribute in the Pick Message from Order Administration (CWPickOut) or the <i>OHD Order date</i> field in the Order Header table.
Purchase Order No.	The purchase order number, if any, that was provided by the sold-to customer. You can enter a purchase order number on the Work with Order screen in order entry. From the po_nbr attribute in the Pick Message from Order Administration (CWPickOut) or the <i>PCH PO #</i> field in the Pick Control Header table.
Source Code	The source code from the order header. From the source attribute in the Pick Message from Order Administration (CWPickOut) or the <i>OHD SRC Source code</i> field in the Order Header table.
Packer	Not currently implemented.
Shipped Via	The first 10 positions of the ship via description, such as UPS or Fed Ex. From the ship_via_desc attribute in the Pick Message from Order Administration (CWPickOut) or the <i>VIA Shipper Name</i> field in the Ship Via table.
Customer No.	The number assigned by the system to identify the sold-to customer. From the sold_to_customer_nbr attribute in the Pick Message from Order Administration (CWPickOut) or the <i>CST Customer #</i> field in the Pick Control Header table.
Order No.	The order number associated with the drop ship pick slip. From the order_nbr attribute in the Pick Message from Order Administration (CWPickOut) or the <i>Order #</i> field in the Order Ship To table.
Page No.	The number of this drop ship pick slip page.

Drop Ship Pick Slip Sold To Label (ORDERED By)	Comments
Drop Ship Pick Slip Detail Information	The system uses the Pick Location table to determine the sequence in which to display the pick slip details on the pick slip. Pick slip details print on the pick slip in zone, location picking sequence number, location, line number sequence. NOTE: Each item prints on a separate drop ship pick slip if the Allow Only Single Line on Drop Ship Pick (C82) system control value is selected. Also, if the Print One Drop Ship Invoice per Ship Alone Item (E38) system control value is selected, a separate drop ship pick slip prints for each unit of a ship-alone item.
Line No.	A unique number to identify the pick slip line number for the item. From the <i>pick_line_nbr</i> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>PCD Line #</i> field in the Pick Control Detail table.
Items Ordered	The number of units ordered on the order line. From the <i>qty_ordered</i> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>ODT qty ordered</i> field in the Order Detail table.
Items Shipped	The quantity of the item to ship on this pick slip. NOTE: • The system highlights the quantity if it is greater than 1. • If this is a ship-alone item and the Print One Drop Ship Invoice per Ship Alone Item (E38) system control value is selected, a separate drop ship pick slip prints for each unit. From the <i>qty_printed</i> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>PCD Original qty printed</i> field in the Pick Control Detail table.
Backordered	This field is not currently used for drop ship pick slips.
Location Code	The location in the warehouse where the item is picked. Included only for items shipping on this pick slip. From the <i>whse_location</i> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>Location</i> field in the Pick Location table.

Drop Ship Pick Slip Sold To Label (ORDERED By)	Comments
Item Number	A code that represents a unit of inventory. A SKU code, such as RED MEDM, prints below the item number if the item contains SKUs. NOTE: The item may have been ordered using a different item number if it is part of a set, or if it was ordered by alias. From the item and sku attributes in the Pick Message from Order Administration (CWPickOut) or the <i>ITM Number</i> and <i>SKU Code</i> in the Pick Control Detail table. Set items: If the main set item or its component items are flagged as ship alone items, a separate pick slip prints for each item included in the set with the message **Other Items Shipped Separately**. The system includes the main set item with a component item that is assigned to the same ship via in order to avoid printing the main set item on its own pick slip. If the main set item and its component items are not flagged to ship alone, the main set item and components print on the same pick slip as the other items. The total for the set prints on one pick slip. For more information on set items, see Entering Set Information (WSET). Gift wrap: The message GIFT WRAP prints on a separate line if the item is flagged for gift wrap. The gift wrap charge is indicated in the <i>Unit price</i> and <i>Extension</i> columns. Special handling instructions: A detailed description of any special handling option, such as color, material, monogramming, engraving, style, or size prints underneath any item to receive special handling. The special handling charge is included in the <i>Shipping & Handling</i> total on the pick slip. Custom special handling information that prints on the pick slip is the <i>special handling option</i>, the <i>customer response</i>, and the <i>special handling charge</i>. Standard special handling instructions are preceded by the description of the additional charge code you use to identify standard special handling. Item or SKU comments: Only comments flagged to Print on picks and invoices or Print on picks only print on the pick slip. Comments can be entered at the base item level or SKU level by selecting Comments for an item at the Work with Items Screen. Order line message: Order line messages flagged to Print on Both or Print on Picks print on the pick slip. You can enter an order line message by selecting Messages for an item at the Work with Order Lines screen.
Description	A description of the item. A description of the SKU is also included if the item contains SKUs. From the item_desc and sku_desc attributes in the Pick Message from Order Administration (CWPickOut) or the <i>Description</i> field in the Item table and <i>Description</i> field in the SKU table.
Unit Price	The amount the customer pays for each unit of the item. Included only for items on this pick slip. Not included on drop ship pick slips for gift orders, or if the Print Amounts on Drop Ship Picks (C81) system control value is unselected. selling_price

Drop Ship Pick Slip Sold To Label (ORDERED By)	Comments
Extension	The item price times the quantity shipped on this pick slip. Not included on drop ship pick slips for gift orders, or if the Print Amounts on Drop Ship Picks (C81) system control value is selected. From the <code>selling_price_extended</code> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>PCD Extension</i> field in the Pick Control Detail table.
Shipped Separately Message	The message **Other Items Shipped Separately** prints above the pick slip totals if other items on the order shipped on a separate pick slip. See Splitting an Order Across Multiple Picks for more information on when the system splits an order into more than one pick.
Drop Ship Pick Slip Totals	Totals print on every page of multi-page drop ship pick slips. No totals print on drop ship pick slips for gift orders or if the Print Amounts on Drop Ship Picks (C81) system control value is unselected.
Total Merchandise	The total merchandise value of all items on the drop ship pick slip, after applying any discounts or repricing. This total does not include items shipping from your warehouse, backordered items, canceled or soldout items, items shipped separately, or items with stock allocation errors. From the <code>merch_amt</code> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>PCH Merch</i> field in the Pick Control Header table.
Shipping & Handling	The total shipping and handling for this shipment, including any freight, additional freight, duty, additional charges, and special handling. If the Prorate Freight Charges (D39) system control value is unselected, the system charges all freight charges on an order with the first shipment; in this situation, all freight charges are added to the first pick slip generated for the order. If the Prorate Freight Charges (D39) system control value is selected, the system charges a proportional amount of freight for partial shipments on an order. However, if the <i>Prorate Freight Charges (D39)</i> system control value is selected and all of the items on the order are exempt from freight, the system applies any item and weight charges defined for the ship via to the first pick slip generated for the order. NOTE: If a negative additional charge is applied to the order, the system deducts the amount from the shipping and handling total. From the <code>freight_amt + addl_freight_amt + addl_charge_amt + hand_charge_amt</code> attributes in the Pick Message from Order Administration (CWPickOut) or the <i>PCH Freight + PCH Add'l Freight + PCH Add'l Charges + PCH Handling</i> fields in the Pick Control Header table.

Drop Ship Pick Slip Sold To Label (ORDERED By)	Comments
Sales Tax	The total tax for all items shipping on the pick slip. This total may include tax on shipping and handling, additional charges, and GST (Goods and Service tax) and PST (Provincial Service tax) tax rates which are specific to companies that operate in Canada and orders shipped to and within Canadian boundaries. For more information on GST and PST tax rates, see Setting Up Order Entry Values. NOTE: Sales tax does not include VAT (Value Added Tax), a taxing method that applies in only certain states and countries and includes the tax in the price of the item. For more information on VAT, see the description of the Tax Included in Price (E70) system control value. From the <code>tax_amt + gst_amt + pst_amt</code> attributes in the Pick Message from Order Administration (CWPickOut) or the <i>PCH Tax + PCH GST + PCH PST</i> fields in the Pick Control Header table.
Order Total	Total merchandise, shipping and handling, additional charges, and tax, for this shipment. From the <code>total_order_amt</code> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>PCH Total Order Amount</i> field in the Pick Control Header table.
Total Paid	The amount the customer prepaid. This total is zero if the customer used a credit card. From the <code>amt_paid</code> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>PCH Amount Paid</i> field in the Pick Control Header table.
Refund	The amount you owe the customer if the prepaid amount is more than the amount due. From the <code>balance_due_amt</code> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>PCH Balance Due</i> field in the Pick Control Header table.
Bal Due	The amount the customer owes you if the prepaid amount is less than the amount due. This amount is zero if the total balance was prepaid or a credit card was applied to the order. From the <code>balance_due_amt</code> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>PCH Balance Due</i> field in the Pick Control Header table.
Total	Total merchandise, shipping and handling, tax, and additional charges. From the <code>total_order_amt</code> attribute in the Pick Message from Order Administration (CWPickOut) or the <i>PCH Total Order Amount</i> field in the Pick Control Header table.

Gift order: You can define an order as a gift order by selecting the Gift field on the Work with Order screen in Order Entry. When you generate drop ship pick slips for the order, the system also generates a gift acknowledgement for the sold-to customer, with the message ****GIFT ACKNOWLEDGEMENT**** after all of the items. See the Gift Acknowledgement for more information.

Order Orchestration Drop Ship Integration

Chapters in this part: The following options are related to integration with Order Orchestration's Drop Ship Manager module.

- [Interface with Order Orchestration's Supplier Direct Fulfillment Module: Overview and Setup](#) describes the setup required for integration with Order Orchestration's Drop Ship Manager module.
- [Supplier Direct Fulfillment Processing](#) provides details on process flows and the communication between Order Administration and Order Orchestration's Drop Ship Manager.
- [Downloading Drop Ship Vendors \(ECSV\)](#) explains how to download initial vendor information for vendors using the Order Orchestration's Drop Ship Manager.
- [Working with Retail Brands \(WRBD\)](#) explains how to create and maintain retail brands for use with the Order Orchestration's Drop Ship Manager.
- [Displaying Unprocessed Drop Ship Items \(DUDS\)](#) describes the menu option you use to review all unprocessed drop ship items, including items fulfilled through integration with Order Orchestration's Drop Ship Manager.
- [Printing Drop Ship Reports \(PDSR\)](#) describes the reports you can use to print information related to orders fulfilled through integration with Order Orchestration's Drop Ship Manager.
- [Working with Drop Ship Background Jobs \(WPBJ\)](#) describes how to start, stop, and troubleshoot the CDC async job.
- [Working with Drop Ship Errors \(WDSE\)](#) describes the screen you use to review or delete records which went into error status when they were transferred between Order Orchestration's Drop Ship Manager and Order Administration.

Setting Up the Fulfillment Tables

Topics in this part:

- [Working with Ship Via Codes \(WVIA\)](#) describes creating, changing, deleting, and displaying shipper records. Additionally, you will find displaying ship via history; working with, creating, changing, and deleting shipper items; and working with SCF ship via values.
- [Working with SCF Codes \(WSCF\)](#) describes creating Sectional Center Facility (SCF) codes.
- [Working with SCF/Ship Via Values \(WSHV\)](#) explains how to create, change, delete, and display these codes.
- [Working with Shipping Rates \(WSHR\)](#) includes creating, changing, deleting, and displaying shipping rates.
- [Working with Drop Points \(WDPT\)](#) describes creating, changing, deleting, and displaying these codes.
- [Editing Warehouse Drop Points \(EWDP\)](#) describes creating, changing, and deleting warehouse drop point information.
- [Editing SCF Ship Via \(ESSV\)](#) describes how to create, change, or delete multiple SCF/ship via values quickly.
- [Working with Dunnage Weight \(WDUN\)](#) describes creating dunnage weights based on the cube of the items on a pick slip, and changing and deleting dunnage weights.
- [Working with Zip/Ship Via \(WZSV\)](#) describes how to cross-reference default shippers for specific destinations based on zip code; this allows you to assign carriers automatically.
- [Working with Tax Jurisdiction \(WTXJ\)](#) describes how to create and work with special tax jurisdiction areas, defined by zip code.

- [Working with Weight Tables for Order Weight \(WFTB\)](#) describes how to create and work with freight tables for the Freight by Order Weight freight method defined for a source code.
- [Working with Offer Ship Via Assignment \(WSVA\)](#) describes how to create and work with ship via overrides based on offer or source code, order or merchandise dollar total, and geographical area.
- [Working with Lines of Business \(WLOB\)](#) describes how to create and work with line of business codes and assignments and explains how the system assigns a line of business to an order.
- [Displaying the Line of Business Order Queue Summary \(DLOQ\)](#) describes the statistics on the Display Line of Business Order Queue Summary screen and explains how the system updates the information on this screen.
- [Creating SCF Ship Vias by SCF Range \(MSSV\)](#) describes how to create SCF ship via information for a selected SCF range, rather than entering this information for each SCF or drop point.
- [Load USPS Zip Code File \(LZPS\)](#) describes how to upload current postal code information from a CD provided by the U.S. Postal Service.

Interface with Order Orchestration's Supplier Direct Fulfillment Module: Overview and Setup

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

You can integrate with Order Orchestration's Supplier Direct Fulfillment module to fulfill drop ship purchase orders with any number of vendors, and at the same time use Order Administration to fulfill drop ship purchase orders with other vendors.

Order Orchestration and its Supplier Direct Fulfillment module are sold as a separate product. For more information about purchasing Order Orchestration, contact your Oracle representative.

For more information: See [Supplier Direct Fulfillment Processing](#) for details on process flows and the communication between Order Administration and Order Orchestration's Supplier Direct Fulfillment module.

In this topic:

- [Integration with Order Orchestration's Supplier Direct Fulfillment Module: Overview](#)
- [Setup for Integration with Order Orchestration's Supplier Direct Fulfillment Module](#)
 - [System Control Values Related to Order Orchestration's Supplier Direct Fulfillment Module](#)
 - [Related Secured Features](#)
 - [Related Menu Options](#)
 - [CDC Async](#)
 - [Property Settings for the Supplier Direct Fulfillment Integration](#)

Integration with Order Orchestration's Supplier Direct Fulfillment Module: Overview

Although Order Administration allows you to process drop ship orders in several ways, manual intervention is required to complete the business processes. The interface with Order Orchestration's Supplier Direct Fulfillment module creates a bridge between Order Administration and the Order Orchestration application so you can exchange information with drop ship vendors via the internet, track transactions, and automate the business process, without the need for manual intervention.

The interface with Order Orchestration's Supplier Direct Fulfillment module automatically sends drop ship purchase order information to Order Orchestration, which makes the information available to your vendors, creates packing slips when the vendors pull orders, and sends tracking and transaction information back to Order Administration. The interface bridge uses one of Order Orchestration's web services to pass information between the two systems.

Vendor Portal: Order Orchestration provides both the screens that you, as the retailer, use for configuration and inquiry, and also a separate Vendor Portal where vendors can log in and work with their assigned purchase orders; the tasks available include printing pack slips and confirming shipments. The Vendor Portal typically resides on a separate server outside your firewall.

Vendor integration: Optionally, you can enable a vendor to integrate with Order Orchestration in order to receive purchase orders and confirm shipments without the requirement to use the Vendor Portal screens for these tasks.

The interface in Order Administration enables you to:

- Identify vendors for whom you use Order Orchestration to process drop ship orders based on the *Drop ship output* setting in the Vendor table.
- Create or update vendor name and information in Order Orchestration based on the information in Order Administration.
- Use retail brands to identify the logos to print on packing documents, and sort purchase orders for review, pack slip generation, and shipment.
- Process drop ship orders using the [Selecting Vendors for Drop Ship Processing \(MDSP\)](#) menu option and:
 - Automatically create and send drop ship purchase orders to Order Orchestration, where they are available to their associated vendors.
 - Through Order Orchestration, automatically send email notifications to your vendors to inform them that there are purchase orders to be selected and fulfilled.
- From [Order Inquiry](#) or [Purchase Order Inquiry \(MPOI\)](#):
 - Initiate a request to cancel a drop ship item.
 - Through Order Orchestration, automatically send an email notification to your vendor regarding the cancel request.
 - Automatically cancel the drop ship purchase order line when the vendor accepts a cancel request.



Note:

If you send a cancel request before the vendor has begun working on the purchase order, Order Orchestration cancels the purchase order line automatically.

- Track the status of Order Orchestration drop ship orders to identify when they have been:
 - Created in Order Administration and sent to Order Orchestration.

- Received by Order Orchestration but not yet selected by the vendor for fulfillment.
- Updated by the vendor, including changes to the due date or to the hold status of a purchase order line.
- Updated with information sent from Order Administration, such as cost changes or address changes.
- Selected by the vendor for fulfillment.
- Canceled or had a cancel request denied.
- Shipped by the vendor.
- When you process backorder cards:
 - You can generate backorder notices with a meaningful expected ship date based on *Vendor lead days* and [Drop Ship Lead Days \(H36\)](#).
 - Optionally, send immediate backorder notices.

For more information: See [Supplier Direct Fulfillment Processing](#).

Setup for Integration with Order Orchestration's Supplier Direct Fulfillment Module

Purpose: Setup in Order Administration for integration with Order Orchestration's Supplier Direct Fulfillment module includes:

- [System Control Values Related to Order Orchestration's Supplier Direct Fulfillment Module](#)
- [Related Secured Features](#)
- [Related Menu Options](#)
- [CDC Async](#)
- [Property Settings for the Supplier Direct Fulfillment Integration](#)

In addition, you need to complete configuration in Order Orchestration. See [Setting Up Data for the Supplier Direct Fulfillment Module in the Order Orchestration online help](#) for more information.

System Control Values Related to Order Orchestration's Supplier Direct Fulfillment Module

System Control Value	Description
Drop Ship Integration Values (H20)	This umbrella system control value defines whether your system uses an interface to transmit information to Order Orchestration for processing drop ship orders. Also, you can use this screen to specify the system code identifying your company in Order Orchestration, and the location code identifying your default warehouse in Order Orchestration.
Use OROB Drop Shipping (H13)	Controls whether the CDC Async will become active, and whether you can set the Drop ship output field for a vendor to OROB drop shipping for integration with Order Orchestration's Supplier Direct Fulfillment module.
Drop Ship Lead Days (H36)	The number of days you want to add to the date passed to Order Orchestration to calculate <i>Expected ship date</i> in Order Administration.
OROB System (K50)	The code identifying your company as a system in Order Orchestration. Used in all communication with Order Orchestration.

System Control Value	Description
OROB Default Location (K51)	The code identifying your default warehouse as a location in Order Orchestration. Used in the CreateDSOrder message to create a purchase order in Order Orchestration.
OROB Account (K49)	The name of the Order Orchestration database, as specified in the <i>Account</i> field at the Tenant screen in version 5.1 or later of Order Broker, or Order Orchestration. In prior Order Broker releases, the account is specified in the <code>locate-config.properties</code> file on the Order Orchestration server. This account name is passed as the destination in messages to Order Orchestration. NOTE: - The Order Orchestration integration with Order Orchestration also uses the OROB Default Location (K51) system control values. - The Drop Ship Integration Values (H20) also includes the OROB Account (K49) system control value; however, this system control value is not used by the Drop Ship Module integration.
Additional system control value: Allow Only Single Line on Drop Ship PO (M13)	If this system control value is selected, the system generates a separate drop ship purchase order for each item when you use Selecting Vendors for Drop Ship Processing (MDSP).
System Control Values Related to Drop Ship Integration Backorder Card Processing	NOTE: System control values <i>FTC - Number of Days to Add for Special Handling (C67)</i> and <i>FTC - Number of Days to Add for Drop Ships (C68)</i>, and <i>Number of Days to Delay Initial Backorder Notice (D89)</i>, which define values used for drop ship processing within Order Administration rather than through an integration. For additional system control values related to backorder card processing for all items, see Purchase Order Layering and Backorder Notifications.
Unconditional Suppression of Backorder Card (F19)	Deselect this system control value if you want to generate backorder notices for any items, including drop ship items.
Backorder Card Print Program (D04)	Must be set to a valid program (the standard program is BOCARDS).
Drop Ship Lead Days (H36)	The number of days you want to add to the date passed to Order Orchestration to calculate <i>Expected ship date</i> in Order Administration.
FTC -- # of Days for Items without Expected Ship Date (C71)	The number of days the system will add to the backorder card processing date to create a new expected ship date.

Related Secured Features

Secured Feature	Description
Order Maintenance Access (A22)	You must have authority to this secured feature to initiate a cancel request.
Cancel OROB Drop Ship PO (J04)	Users with authority to this secured feature can cancel a drop ship purchase order using the Cancel option on the PO Maintenance - Maintain Detail Screen .

Related Menu Options

Menu Option	Description
Working with Drop Ship Background Jobs (WPBJ)	Use this option to start and stop the CDC async job, which processes drop ship transactions and updates passed between Order Administration and Order Orchestration.
Working with Retail Brands (WRBD)	Use this option to create and maintain retail brands, and associate them with one or more entities in your company. You must set up at least one retail brand in order to integrate with the Supplier Direct Fulfillment module. Each retail brand must be associated with at least one entity. Entities are associated with divisions; the source code on an order must point to the division associated with the entity for which you have set up retail brands. See Working with Retail Brands (WRBD) for more information. NOTE: <i>Retail brands</i> appear on Order Orchestration screens as <i>Brands</i>. In Order Orchestration, you can use brands to specify a logo, packing slip messages, and a pack slip and pull sheet form type. Also, the vendor can restrict the display of purchase order information, or the purchase orders selected for pack slip generation.
Creating and Working with Items (MITM)	Vendor item: The information for the vendor item, including the vendor item code, description, price, ship via, lead days, and unit of measure, defaults to the purchase order. If you do not set up a vendor item, the item number and description are passed as the vendor item ID and vendor item description in the CreateDSOrder message to create the purchase order generated through Selecting Vendors for Drop Ship Processing (MDSP), and the PO and vendor unit price are from the item/SKU's cost. Vendor item ship via: The ship via defined for the vendor item of the first line on a drop ship purchase order defaults to the header of a purchase order sent to Order Orchestration's Supplier Direct Fulfillment module; otherwise, if no ship via is defined for the vendor item on the first purchase order line, the ship via from the sales order header is assigned. Ship weight: The item or SKU's ship weight or sell weight defaults when the vendor uses the Integrated Shipping screen in the Vendor Portal to confirm shipment. From the: • <i>Ship weight</i> from the SKU, if any; otherwise, the • <i>Ship weight</i> from the item, if any; otherwise, the • <i>Sell weight</i> from the SKU, if any; otherwise, the • <i>Sell weight</i> from the item, if any; otherwise, no weight is passed. To Send Backorder Notices The Suppress backorder card field in the SKU table must be unselected for the item.
Working with Vendors (WVEN)	For each vendor who will use Order Orchestration's Supplier Direct Fulfillment module to process your drop ship orders, set the <i>Drop ship output field</i> on the Second Create Vendor Screen to OROB drop shipping. You also need to enter an email address for the vendor in the Vendor Contact table.
Working with Entities (WENT)	Use the <i>Retail brand</i> field on the Create/Change/Display Entities screens to associate a retail brand with an entity. Not displayed if the Use OROB Drop Shipping (H13) system control value is unselected. See Working with Retail Brands (WRBD) .

Menu Option	Description
Downloading Drop Ship Vendors (ECSV)	Use this option to transmit new or changed vendor information to Order Orchestration for all vendors whose <i>Drop ship output</i> field is set to OROB drop shipping. See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) for the information sent to Order Orchestration through this menu option.
Displaying Unprocessed Drop Ship Items (DUDS)	Use this option to review all drop ship order detail lines that have been entered but not yet processed through the Selecting Vendors for Drop Ship Processing (MDSP) menu option.
Working with Drop Ship Errors (WDSE)	Use this option to review errors that occurred during the integration with the Supplier Direct Fulfillment module and delete the records in error from the CSF Transaction table (FLCSFT).
Printing Drop Ship Reports (PDSR)	Use this option to print the following reports: • Drop Ship Integration Items on Hold from Vendor Report • Drop Ship Integration Items with Revised Due Date Report • Drop Ship Integration Items Pending Cancellation Report • Drop Ship Integration Items Confirmed Cancellation Report • Drop Ship Integration Items Sent to Integrated System Report • Drop Ship Integration Items Pending Shipment Report • Drop Ship Integration Items Shipped Report

CDC Async

The CDC async job processes drop ship transactions between Order Orchestration and Order Administration. For each company that has the [Use OROB Drop Shipping \(H13\)](#) system control value selected, and for each vendor whose *Drop ship output field* is set to OROB drop shipping, the job processes:

- sending address changes to Order Orchestration (SetDSAddressChange message)
- sending cost changes to Order Orchestration (SetDSCostChange message)
- sending cancellation requests to Order Orchestration (SetDSCancel message)
- requesting activity updates from Order Orchestration (GetDSChanges message)

See the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for examples of these messages and additional background.

The CDC async job does not send new purchase orders (the CreateDSOrder message) or new/updated vendors (the CreateDSVendor message) to Order Orchestration. See [Sending Drop Ship Purchase Order Information to the Supplier Direct Fulfillment Module](#) and [Downloading Drop Ship Vendors \(ECSV\)](#) for information on these processes.

You can start and stop the CDC async job using the [Working with Drop Ship Background Jobs \(WPBJ\)](#) menu option. The CDC async job should be stopped and started each day.



Note:

You can start the CDC async job only if the [Use OROB Drop Shipping \(H13\)](#) system control value on the [Drop Ship Integration Values \(H20\)](#) is selected for at least one company in your environment.

For more information: See [Troubleshooting the CDC Async Job](#) for troubleshooting steps.

Property Settings for the Supplier Direct Fulfillment Integration

Complete the following settings in [Working with Customer Properties \(PROP\)](#).

- **OROB_PURCHASING_SERVICES_MESSAGE_VERSION:** Specifies the outbound message version to send to Order Orchestration for integration with the Supplier Direct Fulfillment module. Should be set to 4.5 or higher.
- **OROB_PURCHASING_SERVICES_WSDL_LOCATION:** Needs to specify the endpoint for the Purchasing Services web service. This entry should be set to `https://SERVER:8443/Locate/PurchasingServices`, where **SERVER** is the name of your Oracle Retail Order Orchestration server.
 - Required if you are integrating with Order Orchestration's Supplier Direct Fulfillment module.
 - If the purchasing web service requires basic web service authentication, you must define a valid web service authentication user and password in [Working with Web Service Authentication \(WWSA\)](#), or define a client ID if using OAuth.
- **OROB_PURCHASING_SERVICES_MAX_UPDATES:** Indicates the maximum number of drop ship updates for Order Orchestration to include in drop ship status inquiry responses. For example, you might set this number to 100 to prevent a large number of status updates from impeding system performance. If this property is blank, Order Orchestration does not limit the number of updates included in the response message.
- The **OROB_SERVICES_WSDL_LOCATION** property needs to specify the endpoint for the Services web service. This entry should be set to `https://SERVER:8443/Locate/LocateServices`, where **SERVER** is the name of your Oracle Retail Order Orchestration server.

For more information: See [Order Orchestration Configuration](#) for configuration requirements related to integration with Order Orchestration's Order Orchestration.

Supplier Direct Fulfillment Processing

Purpose: Order Orchestration's Supplier Direct Fulfillment module is an Oracle application that provides a collaborative, browser-based environment for retailers and vendors to share order, customer, and shipping information related to [Drop Ship Processing](#), and to automatically process drop ship orders.

Order Orchestration and its Supplier Direct Fulfillment module are sold as separate products. For more information about purchasing Order Orchestration's Supplier Direct Fulfillment, contact your Oracle representative.

In this topic:

- [Supplier Direct Fulfillment Information Flow](#)
 - [What Does Order Administration send to Order Orchestration's Supplier Direct Fulfillment Module?](#)
 - [What Does Order Orchestration's Supplier Direct Fulfillment Module send to Order Administration?](#)
 - [Creating or Updating Vendors in Order Orchestration](#)
 - [Creating Drop Ship Orders for Order Orchestration's Supplier Direct Fulfillment Module](#)
 - [Sending Drop Ship Purchase Order Information to the Supplier Direct Fulfillment Module](#)
 - [Viewing Errors and Re-entering Orders in Error](#)

- Shipping Orders through the Supplier Direct Fulfillment Module
- Updates to Order Orchestration Drop Ship Purchase Orders
 - Cancelling Order Orchestration Drop Ship Order Lines
 - Changing Address and Cost Information
- Drop Ship Reports
- Supplier Direct Fulfillment Backorder Notice Processing

Supplier Direct Fulfillment Information Flow

In this topic:

- What Does Order Administration send to Order Orchestration's Supplier Direct Fulfillment Module?
- What Does Order Orchestration's Supplier Direct Fulfillment Module send to Order Administration?
- Creating Drop Ship Orders for Order Orchestration's Supplier Direct Fulfillment Module
- Sending Drop Ship Purchase Order Information to the Supplier Direct Fulfillment Module
- Viewing Errors and Re-entering Orders in Error
- Shipping Orders through the Supplier Direct Fulfillment Module

What Does Order Administration send to Order Orchestration's Supplier Direct Fulfillment Module?

Order Administration sends the following information to Order Orchestration for Supplier Direct Fulfillment:

- Vendor: current name and address
- New purchase orders
- Purchase order address changes
- Purchase order cost changes
- Purchase order cancel requests

What Does Order Orchestration's Supplier Direct Fulfillment Module send to Order Administration?

Order Orchestration's Supplier Direct Fulfillment module sends the following information to Order Administration:

- Purchase order acknowledgements
- Purchase order updates, including address change and cancellation acceptances or rejections, status changes, and changes to accepted ship dates
- Purchase order shipment confirmations

Creating or Updating Vendors in Order Orchestration

Order Administration sends the `CreateDSVendor` message for each vendor whose *Drop ship output* field on the [Second Create Vendor Screen](#) to OROB drop shipping when you use the [Downloading Drop Ship Vendors \(ECSV\)](#) option. If the vendor already exists in Order Orchestration, the existing information is overwritten. See the Order Administration Web Services Guide on <https://support.oracle.com> (ID 2953017.1) for the vendor information that Order Administration sends to Order Orchestration.

You can also use the Order Orchestration screens to create or update a vendor, and need to use these screens to specify additional vendor configuration options, such as assignment of carriers (ship vias), pack slip output, and the creation of vendor user IDs who can log into the Vendor Portal.

 Note:

You can also create a vendor through the CreateDSOrder message sent through [Selecting Vendors for Drop Ship Processing \(MDSP\)](#) if the vendor does not already exist in Order Orchestration; however, this creates the vendor with minimal information, and you will need to complete vendor setup, typically through the Order Orchestration screens.

Creating Drop Ship Orders for Order Orchestration's Supplier Direct Fulfillment Module

You must identify the vendor for each item flagged for drop ship, and typically use the vendor item record to specify additional information about the item to include on the purchase order. You flag a drop ship vendor to use Order Orchestration's Supplier Direct Fulfillment module by setting the vendor's [Drop ship output](#) field to OROB drop shipping. The [Selecting Vendors for Drop Ship Processing \(MDSP\)](#) option determines whether to send purchase orders to Order Orchestration based on this setting.

You can view all unprocessed drop ship orders, regardless of whether the vendor is flagged for Order Orchestration drop shipping or any other setting, using the [Displaying Unprocessed Drop Ship Items \(DUDS\)](#) menu option.

D/S PO history: When you create the purchase order through [Selecting Vendors for Drop Ship Processing \(MDSP\)](#), the [Display P/O Drop Ship Screen](#) displays the message: Drop Ship PO Created.

Sending Drop Ship Purchase Order Information to the Supplier Direct Fulfillment Module

You create and send drop ship purchase orders through the [Selecting Vendors for Drop Ship Processing \(MDSP\)](#) menu option. For drop ship purchase orders whose vendors are flagged for OROB drop shipping, the system:

- Creates drop ship purchase order records.
- Sends the CreateDSOrder message to Order Orchestration to create the purchase order for any drop ship items on the order for each vendor. Multiple items are included on the same purchase for a vendor, regardless of whether the items are flagged to ship alone. See the Order Administration Web Services Guide on <https://support.oracle.com> (ID 2953017.1) for details on the information included in the message.

When Order Orchestration receives a purchase order, it sends an email notification to the vendor indicating that there are drop ship purchase orders to be fulfilled.

The vendor can access the purchase order information in the Order Orchestration Vendor Portal. At this point, the drop ship purchase order has been created and sent, but not yet selected by the vendor for fulfillment.

 Note:

You can also print or reprint a drop ship purchase order using the [Printing Purchase Orders \(MPRP\)](#) menu option. Printing or reprinting a drop ship purchase order does not resend the purchase order to Order Orchestration.

D/S PO history: When Order Administration sends the purchase order to Order Orchestration, the [Display P/O Drop Ship Screen](#) displays the message: PO available to vendor.

Required Information in Order Orchestration

When you use [Selecting Vendors for Drop Ship Processing \(MDSP\)](#) to send a new drop ship purchase order to Order Orchestration through the CreateDSOrder message, the information in the message includes:

- **vendor:** If the vendor does not already exist in Order Orchestration, Order Orchestration creates the record using the vendor code, name, and email address specified; however, this is the only vendor information included in the CreateDSOrder message, and you will need to complete vendor configuration in Order Orchestration. See [Creating or Updating Vendors in Order Orchestration](#) for information on sending current vendor name and address information to Order Orchestration.

Order Orchestration does not update an existing vendor based on the code, name, or email address passed in the CreateDSOrder message.

- **carrier:** If the ship via does not already exist in Order Orchestration as a valid carrier, Order Orchestration creates a new carrier based on the ship via code; however, this is the only carrier information included in the CreateDSOrder message, and you will need to complete carrier configuration in Order Orchestration. If the ship via code is a single position, it is passed with a padding zero; for example, a code of 7 is passed as 07.
- **item:** If the item does not already exist in Order Orchestration as a valid item, and Order Administration is the system of record in your Order Orchestration organization, Order Orchestration creates the item and vendor item, using the information passed in the CreateDSOrder message.

The drop ship item and vendor item in Order Orchestration do not need to match an existing product imported into Order Orchestration as part of Order Orchestration processing, and the item does not need to be flagged as *OROB eligible* in Order Administration.

- **brand:** The brand you set up through [Working with Retail Brands \(WRBD\)](#) must match a brand you have created in Order Orchestration.

For more information: See the Order Administration Web Services Guide on <https://support.oracle.com> (ID 2953017.1) for details on the data passed to Order Orchestration from Order Administration.

Special Handling on Orders Sent to the Supplier Direct Fulfillment Module

The Supplier Direct Fulfillment interface supports only custom special handling for drop ship items. See the [Work with Special Handling Screen](#) for information on entering custom special handling instructions.

To set up custom special handling for a drop ship item, see [Establishing Custom Special Handling Formats \(WSHF\)](#).

Order and Gift Messages

The Supplier Direct Fulfillment interface sends the following messages for a drop ship purchase order:

- **Order messages or gift messages:** Up to 8 total order header (sales order) messages with a *Print* flag setting of Picks, Both, or Gift msg can print below the ship-to address at the top of the pack slip.
- **Order line messages:** You can send up to 99 order line messages for a drop ship order line. Order line messages identified in Order Administration with a *Print* flag setting of Picks or Both print below the order line on the pack slip.

See [Adding Order Messages](#).

Viewing Errors and Re-entering Orders in Error

You can use the [Working with Drop Ship Errors \(WDSE\)](#) menu option to review different types of drop ship errors, including errors related to sending a purchase order to Order Orchestration.

You cannot resend a drop ship purchase order if Order Orchestration does not receive it; instead, you can recreate the order as a new order to process it, or retrieve the CreatedDSOrder message from Order Orchestration's `xml_ds.log` and resend it to Order Orchestration if the message was logged.

Requesting Updates from Order Orchestration

To obtain updates on vendor activity related to drop ship purchase orders, the CDC async job periodically sends the GetDSChanges request message to Order Orchestration for each company whose [Use OROB Drop Shipping \(H13\)](#) system control value is selected. Possible activities include:

- generating the pack slip
- acknowledgement of the purchase order from an integrated vendor
- shipment: see [Shipping Orders through the Supplier Direct Fulfillment Module](#)
- acceptances or rejections of cancel requests: see [Cancelling Order Orchestration Drop Ship Order Lines](#)
- vendor changes to due dates or a purchase order line's hold status: see the Order Administration Web Services Guide on <https://support.oracle.com> (ID 2953017.1).

Examples: See the [Display P/O Drop Ship Screen](#) for examples of related history messages.

How many changes sent? The `OROB_PURCHASING_SERVICES_MAX_UPDATES` in [Working with Customer Properties \(PROP\)](#) determines the maximum number of changes to request for each company at a time. If the number of changes since the last request exceeds this maximum, Order Orchestration sends any additional changes in response to the next GetDSChanges request.

Shipping Orders through the Supplier Direct Fulfillment Module

When your vendor completes shipment of a drop ship purchase order line, the Order Administration purchase order line is closed, and the corresponding Order Administration order line is also closed. Order Administration automatically performs shipment confirmation updates for the order and the purchase order.

Depending on the carrier settings you have specified in Order Orchestration, vendors may be required to enter or upload shipping-related information (including carrier (ship via), tracking number, rate, weight, and ship date) for shipments. This shipment information is transmitted to Order Administration and can be available to the customer through, for example, the shipment confirmation email.

If the carrier does not match a valid ship via: If the carrier passed for a shipment in the GetDSChanges response message does not match a valid ship via, Order Administration uses the existing ship via on the order. In this case, the tracking number link in the shipment confirmation email might not be a valid link for the ship via indicated.

Order Administration does not require that there be a valid SCF/ship via record for the carrier passed for the shipment and the shipping address on the order.

Order Orchestration sends shipment information to Order Administration in the GetDSChanges response message. See the Order Administration Web Services Guide on <https://support.oracle.com> (ID 2953017.1) for more information.

D/S PO history: When Order Administration receives a shipment confirmation update from Order Orchestration, the [Display P/O Drop Ship Screen](#) displays a message such as: Item Shipped 11/02/13.

Updates to Order Orchestration Drop Ship Purchase Orders

Overview: The changes that you can apply to purchase orders once they are sent to Order Orchestration are described below.

Note:

Changes can be applied to purchase orders only if the vendor uses the Vendor Portal screens. If the vendor uses the vendor integration rather than Vendor Portal screens to work with purchase orders, the changes are not sent to the integrated vendor's system.

- [Cancelling Order Orchestration Drop Ship Order Lines](#)
- [Changing Address and Cost Information](#)

Cancelling Order Orchestration Drop Ship Order Lines

You can request to cancel a Order Orchestration drop ship order line at the [Display P/O Drop Ship Screen](#), available through standard Order Inquiry or Purchase Order Inquiry. Order Administration sends the SetDSCancel message to Order Orchestration. It is not possible to cancel a partial quantity. If the vendor has:

- not yet generated a pack slip for the purchase order line, Order Orchestration cancels the line automatically. The cancellation is noted in the next GetDSChanges response message from Order Orchestration, and Order Administration cancels the line.
- already generated a pack slip for the purchase order line or put the line on hold, Order Orchestration notifies the vendor that there is a cancellation request pending and displays related messages on various screens in the Vendor Portal. If the vendor:
 - accepts the cancel request, Order Orchestration cancels the line automatically. The cancellation is noted in the next GetDSChanges response message from Order Orchestration, and Order Administration cancels the line. Similarly, if the line goes back to New Order status in Order Orchestration if the vendor voids the pack slip, Order Orchestration cancels the line automatically.
 - declines the cancel request Order Orchestration does not cancel the line. Order Orchestration sends an email notification to your *PO Status Notification* email address specified through its **Drop Ship Preferences** screen. The rejection is noted in the next GetDSChanges response message from Order Orchestration, and Order Administration does not cancel the line.
 - confirms shipment without responding to a cancel request, Order Orchestration closes the purchase order line. The shipment is noted in the next GetDSChanges response message from Order Orchestration, and Order Administration bills the line.

If line is already shipped? If the cancel request arrives in Order Administration after the vendor has confirmed shipment of the line, Order Orchestration automatically rejects the cancel request and does not perform any additional updates, but does send an email

notification to your *PO Status Notification* email address specified through its **Drop Ship Preferences** screen.

You can generate a report of pending cancellation requests using the [Printing Drop Ship Reports \(PDSR\)](#) menu option. See [Drop Ship Reports](#).

D/S PO history: When you send a cancellation request to Order Orchestration, the [Display P/O Drop Ship Screen](#) displays the message: Cancel Request Sent. If:

- the vendor declines the cancel request, the message is Cancel Request Rejected.
- the vendor accepts the cancel request, or the cancellation applies automatically because the vendor has not yet begun processing the purchase order, the message is Cancel Request Confirmed
- the cancellation is rejected automatically because the vendor has shipped the line, there is no message noting the automatic rejection.

Secured feature: If you have authority to the [Cancel OROB Drop Ship PO \(J04\)](#) secured feature, you can cancel a Order Orchestration drop ship purchase order line using the Cancel option on the [PO Maintenance - Maintain Detail Screen](#). In this situation, the system does not send a cancel request to Order Orchestration and instead immediately performs a full cancellation, cancelling the purchase order line and order line, removing the printed quantity on the order line, writing an order transaction history message: `DS PO line canceled`, and updating the drop ship status of the line to cancelled.

 Note:

- The only situation in which you should use the Cancel option on the [PO Maintenance - Maintain Detail Screen](#) to cancel a Order Orchestration drop ship purchase order line is if you have previously sent a cancel request to Order Orchestration and did not receive a response indicating whether the vendor confirmed or rejected the cancellation.
- Because the cancellation updates the drop ship status of the line to cancelled, you cannot use the cancel request option on the [Display P/O Drop Ship Screen](#) to send a cancellation request to Order Orchestration. However, if Order Orchestration returns an update in the GetDSChanges response message for the order line that updates its status to an open status, such as Held, after the cancellation has been performed, you can use the cancel request option to send a cancellation request to Order Orchestration.
- If the GetDSChanges response message includes a shipment confirmation from Order Orchestration after the line has been cancelled, Order Administration does not update the line as shipped, but does update order transaction history with the shipment confirmation.

For more information: See the Order Administration Web Services Guide on <https://support.oracle.com> (ID 2953017.1) for details on the information sent to Order Orchestration for a cancellation request.

Changing Address and Cost Information

- [Changing Address Information](#)
- [Changing Cost Information](#)

Changing Address Information

When you maintain an order that includes at least one Order Orchestration drop ship PO line item which has been sent to Order Orchestration and has not yet been shipped, and the changes to the order include an update to the ship-to address, Order Administration sends the updated address information to Order Orchestration in the SetDSAddressChange message.

Sold-to same as ship-to? If the sold-to and the ship-to address are the same, then the SetDSAddressChange message includes a flag indicating to apply the same update to both.

Updates in Order Orchestration: Order Orchestration creates a record of the original and changed ship-to address and:

- If all lines on the PO are in a new (not in process) status, automatically updates the address information and does not generate an email to the vendor.
- If any line on the PO is already in process, generates an email notification to the vendor about the requested address change; also, various screens in the Vendor Portal display a warning message about the requested change. If the vendor:
 - declines the address change, Order Orchestration sends an email notification of the rejection to your *PO Status Notification* email address specified through its **Drop Ship Preferences** screen.
 - accepts the address change, Order Orchestration updates the address for all open (unshipped, uncanceled) lines. The vendor then needs to void and reprint the pack slip in order to generate a pack slip with the correct address.
- If all lines on the PO are in shipped or cancelled status, Order Orchestration automatically rejects the address change and sends an email notification of the rejection to your *PO Status Notification* email address specified through its **Drop Ship Preferences** screen.

Conditions:

- If you update a customer's address in any way besides using order maintenance to maintain the order that includes the drop ship purchase order, the address change is not sent to Order Orchestration.
- If there are additional open purchase orders for the same customer being fulfilled through the Supplier Direct Fulfillment module, Order Administration does not send address updates to Order Orchestration for these purchase orders.
- If you change the sold-to customer's address but the order is shipping to a different address, Order Administration does not send an address update to Order Orchestration.
- If you change information that is not part of the shipping address, Order Administration does not send an address update to Order Orchestration.

D/S PO history: When you send an address change request to Order Orchestration, the [Display P/O Drop Ship Screen](#) displays the message: Address change sent to vendor. No additional drop ship purchase order history is written for address changes, regardless of vendor action or automatic acceptance or rejection.

For more information: See the Order Administration Web Services Guide on <https://support.oracle.com> (ID 2953017.1) for details on the information sent to Order Orchestration for an address change request.

Changing Cost Information

When you update the Cost field on the [PO Maintenance - Change PO Detail Screen](#), Order Administration sends the SetDSCostChange message to Order Orchestration. Order Orchestration creates a record of the original and updated PO cost, and updates the PO with the new cost. No action by the vendor is required.

D/S PO history: When you change the cost of a purchase order line, the [Display P/O Drop Ship Screen](#) displays the message Cost change sent to vendor if you advance to the screen through Purchase Order Maintenance (MPOI). This message is not displayed in order inquiry.

For more information: See the Order Administration Web Services Guide on <https://support.oracle.com> (ID 2953017.1) for details on the information sent to Order Orchestration for a cost change request.

Drop Ship Reports

You can use the [Printing Drop Ship Reports \(PDSR\)](#) menu option to generate reports for drop ship purchase orders fulfilled through the Supplier Direct Fulfillment module:

- [Drop Ship Integration Items on Hold from Vendor Report](#)
- [Drop Ship Integration Items with Revised Due Date Report](#)
- [Drop Ship Integration Items Pending Cancellation Report](#)
- [Drop Ship Integration Items Confirmed Cancellation Report](#)
- [Drop Ship Integration Items Sent to Integrated System Report](#)
- [Drop Ship Integration Items Pending Shipment Report](#)
- [Drop Ship Integration Items Shipped Report](#)

Supplier Direct Fulfillment Backorder Notice Processing

Backorder notices for drop ship items fulfilled through the Supplier Direct Fulfillment module are based on accurate expected ship date information that your vendors communicate to Order Administration. Because expected shipment information is readily available for these drop ship items, the interface evaluates drop ship items for backorder notices in a manner similar to the way it evaluates non-drop-ship backordered items. The integration offers the following advantages over regular drop ship processing:

- When you enter an order for a drop ship item fulfilled through the Supplier Direct Fulfillment module, the system calculates an expected ship date based on vendor item [Lead days](#) plus the [Drop Ship Lead Days \(H36\)](#).
- When your vendor revises the expected ship date for a drop ship order line, the expected ship date is updated on the Order Administration order. This updated expected ship date is included on the backorder notice to the customer.
- Drop ship items fulfilled through the Supplier Direct Fulfillment module are eligible for immediate backorder card notices, if immediate notices are selected for the order type.

Setup for backorder notifications: If you want to generate backorder notices for an item fulfilled through the Supplier Direct Fulfillment module:

- leave the [Suppress backorder card](#) field in the SKU table unselected.
- make sure the [Unconditional Suppression of Backorder Card \(F19\)](#) system control value is unselected.
- set accurate [Lead days](#) for the vendor item, using the [Working with Vendor Items \(WVNI\)](#) menu option.
- set the [Drop Ship Lead Days \(H36\)](#) system control value to the number of days you want to add to the date passed to Order Orchestration to calculate the *Expected ship date* in Order Administration.

Due date calculation: For a purchase order line fulfilled through the Supplier Direct Fulfillment interface, the due date sent to the vendor and the *Expected ship date* to present to the

customer are calculated as: Current date + Vendor item [Lead days](#) + [Drop Ship Lead Days \(H36\)](#).

Future arrival date? An order line with a future *Arrival date* will not be eligible for processing through [Selecting Vendors for Drop Ship Processing \(MDSP\)](#) until the line's *Arrival date* is within the vendor item lead days for the item plus the [Drop Ship Lead Days \(H36\)](#).

When the expected ship date passes with no shipment: If the *Expected ship date* passes, the *Next BO card date* has been reached, and the item has not been shipped, the backorder notification program generates a notification to the customer. In this case, the new *Expected ship date* reported to the customer is calculated by adding the [FTC -- # of Days for Items without Expected Ship Date \(C71\)](#) to the date you generate the backorder notices.

Example: When the expected ship date passes but the order has not shipped:

- Order date: 9/10
- Arrival date: 9/10
- Vendor item lead days: 14
- Drop ship lead days (H36): 3
- Expected delivery date [Current date + Vendor item lead days + Drop ship lead days]: 9/27
- [FTC -- # of Days for Items without Expected Ship Date \(C71\)](#): 30

Date	Action	Backorder Notice Result (GBOC)
9/10	You enter the order.	No notice is produced (<i>Immediate Backorder Notification</i> is set to N). Expected ship date on the order is 9/27.
9/27	Expected ship date expires but the order has not shipped.	Backorder notice is generated with new expected ship date: 10/25. (9/27 + FTC -- # of Days for Items without Expected Ship Date (C71)).

When the vendor revises the expected ship date: When the vendor revises an expected ship date, the system updates the *Expected ship date* to reflect your vendor's entry. If the *Expected ship date* is later than the date calculated when you entered the order, and the *Next BO card date* for the line has been reached, the backorder notification program generates a notification with the revised date the next time you generate notifications.

See [System Control Values Related to Order Orchestration's Supplier Direct Fulfillment Module](#) for information on system control value settings.

Example:

- Order date: 9/10
- Arrival date: 9/10
- Vendor item lead days: 14
- Drop ship lead days (H36): 3
- Expected delivery date [Current date + Vendor item lead days + Drop ship lead days]: 9/27

Date	Action	Backorder Notice Result (GBOC)
9/10	You enter the order.	No notice is produced (<i>Immediate Backorder Notification</i> for the order type is unselected). <i>Expected ship date</i> on the line is 9/27.

Date	Action	Backorder Notice Result (GBOC)
9/20	Your vendor revises the expected ship date to 10/14.	If the <i>Next BO card date</i> has been reached, a backorder notice is generated with the new expected ship date of 10/14.
10/14	Expected ship date expires but the order has not shipped.	If the <i>Next BO card date</i> has been reached, a backorder notice is generated with the new expected ship date of 11/13 (10/14 + FTC -- # of Days for Items without Expected Ship Date (C71)).

Immediate backorder notice? For drop ship items processed through the Supplier Direct Fulfillment interface, you have the option to generate immediate backorder notifications to inform your customers of an accurate expected delivery date. Immediate backorder notifications are controlled by [Immediate B/O notice](#) setting for the order type, set up in the [Establishing Order Types \(WOTY\)](#) menu option.



Note:

The [Number of Days to Delay Initial Backorder Notice \(D89\)](#) system control value does not apply to items fulfilled through the Supplier Direct Fulfillment module.

Shipping Zone Reservation

Topics in this part:

- [Shipping Zone Reservation Overview](#) provides a brief overview of the shipping zone reservation process, and provides a flow chart of the process of order entry for zone reservation items.
- [Creating and Maintaining Geographic Zones \(WGZN\)](#) describes how to set up and maintain geographic zones using zip codes or SCF codes.
- [Creating and Maintaining Zone Reservation Codes \(WZRC\)](#) shows you how to set up and maintain the zone reservation codes that will be assigned to weather-sensitive items to insure that they will ship at an optimal time for planting in the regions to which they are going.
- [Creating and Maintaining Zone Reservation Dates \(WZRD\)](#) describes zone reservation date windows and shows you how to set up and maintain zone reservation dates.

Shipping Zone Reservation Overview

Purpose: The Shipping Zone Reservation process insures that weather-sensitive inventory, such as plant stock, will ship to different regions of the country within time windows suitable to the regions, or *geographic zones*, of the country. Frost-sensitive seedlings, for example, must be shipped after the last frost date, but early enough in the season for optimal growth. This date window varies for different geographic zones.

The zone reservation process identifies weather-sensitive items as they are ordered. These items are not reserved during order entry; instead, they are assigned a backorder status of Z (Zone reservation), and are reserved during pick slip generation.

The zone reservation process:

- evaluates the shipping address for the order to determine which geographic zone the order will ship to
- determines the season for which an item is being ordered
- determines whether the item is zone reservation-coded, and, if it is:
 - evaluates the applicable zone reservation date window for the item in this geographic zone and this season
 - applies zone reservation rules to the order line in order entry and maintenance

In this topic:

- [About Geographic Zones](#)
 - [Zone Reservation Seasons](#)
- [When Do Zone Reservation Rules Apply?](#)
- [Zone Reservation Rules](#)
 - [Standard Zone Reservation Rules](#)
 - [Alternate Zone Reservation Rules](#)
- [Pop-up Windows](#)
 - [Display Zone Reservation Dates Window](#)
 - [Select Order Line Option Window](#)
- [Overriding Zone Reservation Rules by Arrival Date](#)
- [Zone Reservation Rules Summary](#)
- [Zone Reservation Setup](#)
 - [Other Optional Table Values](#)
 - [Reserving Items/Generating Pick Slips](#)
 - [Zone Reservation/Long SKU Class](#)
- [Other Information to Note](#)

About Geographic Zones

The country is divided into geographic zones based on relative weather conditions. The shipping zone reservation process uses geographic zones to restrict shipping of weather-sensitive inventory such as plant stock. Each particular kind of plant stock will have a shipping date window corresponding to each zone of the country.

Example: You might ship asparagus roots to Florida (Zone 9) in February, to Rhode Island (Zone 6) in April, and to Maine (Zone 3) in May.

Geographic zones are linked to zip codes or to SCF codes. The system first looks at the zip code of the shipping address to determine if the Zip/City/State table specifies a geographic zone. If it does not, the system looks at the SCF table to determine the geographic zone. The geographic zone of the zip code overrides the geographic zone of the SCF. If you have not assigned a geographic zone to either the zip code or the SCF code for an order's shipping address, zone reservation rules do not apply to your order.

Zone reservation codes: Items such as bulbs, bare root plants, or potted plants can be assigned zone reservation codes that group them for the purpose of restricting shipping dates. Each zone reservation code has a different set of restrictions.

Example: Bulbs may have earlier shipping windows than bare root plants. Tulip bulbs, Crocus bulbs and Daffodil bulbs might be assigned to a zone reservation code with an early spring

shipping window for each zone of the country. (Early spring in Florida may be February; early spring in Maine may be April.) Asparagus roots may be assigned to a zone reservation code with a mid-spring shipping window to each zone of the country. (Mid-spring in Florida may be March; mid-spring in Maine may be May.)

Zone reservation codes are assigned at the SKU level.

The following types of items are not eligible for zone reservation codes:

- [Drop ship](#) items
- [Non/inv \(Non inventory\)](#) items
- [Kit type](#) items of type:
 - S = Set
 - V = Variable set

Zone reservation date windows: Zone reservation date windows specify the best time for shipping zone reservation-coded items to different geographic zones in the country. For each zone reservation code, you can define a set of zone reservation date windows, one window for each geographic zone.

A zone reservation date window consists of the following dates:

- Start date: the date you start shipping an item with this code.
- Deferred cutoff date: the backorder cutoff date. On or after this date you will not take orders for this item if the item is not available in your warehouse.

**Note:**

The Deferred cutoff date is not considered if you use alternate zone reservation rules, as controlled by the [Use Alternate Zone Reservation Logic \(I52\)](#) system control value. See [Alternate Zone Reservation Rules](#) for a discussion.

- Cutoff date: the cutoff date for taking orders, whether or not stock is available in your warehouse.
- End date: the last date for shipping the item.
- Next season open date: the start date of the next season for items with this code.

Example: If you have set up a zone reservation code which includes asparagus roots, and you have divided the country into 6 geographic zones, (Zone 1 through Zone 6), then for each zone you can define a zone reservation date window for shipping asparagus roots.

Zone Reservation Code: AR (Roots):		Spring shipping dates			
Zone	Dates				
	Start date	Deferred cutoff date	Cutoff date	End date	Next open date
Zone 1 (Deep South)	2/1/06	3/1/06	3/15/06	4/1/06	2/1/06
Zone 2 (Mid South)	2/10/06	3/10/06	3/25/06	4/11/06	2/10/06

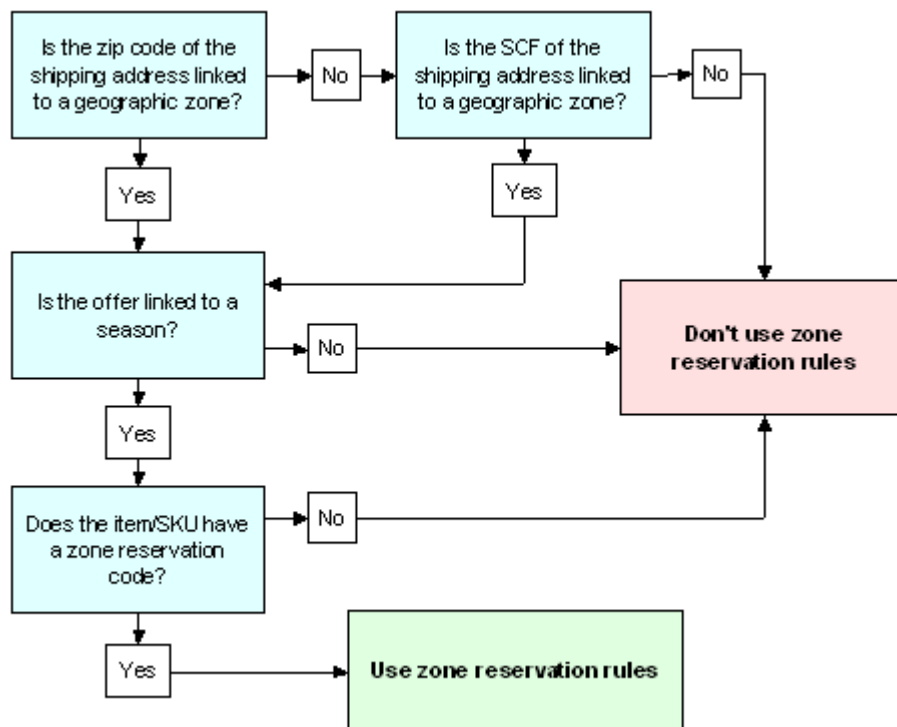
Zone Reservation Code: AR (Roots):		Spring shipping dates			
Zone 3 (South Atlantic)	2/20/06	3/20/06	4/5/06	4/20/06	2/20/06
Zone 4 (Mid-Atlantic)	3/1/06	4/1/06	4/15/06	5/1/06	3/1/06
Zone 5 (New England/Central)	3/15/06	4/15/06	4/30/06	5/5/06	3/15/06
Zone 6 (North)	4/1/06	4/20/06	5/5/06	5/10/06	4/1/06

Zone Reservation Seasons

A zone reservation-coded item may be shipped in more than one season. For example, you might offer potted perennials in spring and in fall. You would specify two sets of zone date windows: one set for spring, and one for fall.

The zone reservation season is specified on the offer associated with the source code on the order header.

When Do Zone Reservation Rules Apply?



For an order line to be eligible for zone reservation processing:

- The item/SKU must be assigned a zone reservation code in the item table to identify it as a zone reservation item.
- The offer associated with the order must be linked to a season in the offer table

- The shipping address must be assigned to a geographic zone. The system uses ZIP codes or SCF codes to identify geographic zones.
- For each zone reservation code, you must define zone date windows for all geographic zones in the country.



Note:

In order for the system to search for a zone in order entry or maintenance, the [Bypass Geographic Zone Searching in Order Entry/Order Maintenance \(H55\)](#) system control value must be unselected.

Zone Reservation Rules

How does the system use zone reservation dates? Zone reservation date windows are used in order entry or maintenance as the basis for zone reservation rules, which control the arrival date for the order line, the display of pop-up windows, and the ability to backorder zone reservation-coded items. Order lines which fall under zone reservation rules are not reserved during order entry; they are reserved during pick slip generation.

Standard Zone Reservation Rules

If the [Use Alternate Zone Reservation Logic \(I52\)](#) system control value is unselected, items which are eligible for zone reservation processing in order entry follow these rules based on the current date:

Prior to the season start date:

- The order line is taken as an open order, but is not reserved.
- The backorder status = F (Future order).
- The arrival date of the order = the zone start date.
- The system presents the [Display Zone Reservation Dates Window](#) if you have flagged the order type to display zone date windows.

After the season start date but prior to the zone start date:

- The order line is taken as an open order, but is not reserved.
- The backorder status = Z (Zone reservation).
- The arrival date of the order line = the current date.
- The system presents the [Display Zone Reservation Dates Window](#) if you have flagged the order type to display zone date windows.

After the zone start date but prior to the deferred cutoff date:

- The order line is taken as an open order, but is not reserved.
- The backorder status = Z (Zone reservation).
- The arrival date of the order line = the current date.

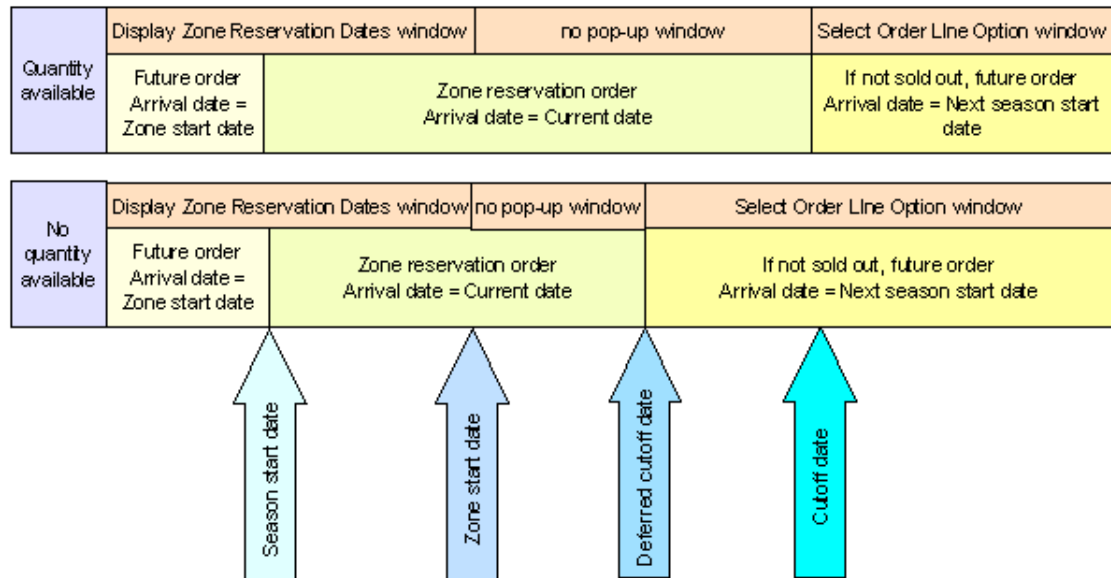
After the deferred cutoff date (backorder cutoff date) but prior to the cutoff date:

- If stock is available, the order follows the rule listed above.
- If stock is not available, the order line follows the rule below.

After the cutoff date, the [Select Order Line Option Window](#) presents two options:

1. Sell out the order line
2. Take the order line as a future order (backorder status = F) with an arrival date = the next season's start date

Future orders: An order line taken outside the season as a future order will have a future *Arrival date* and a backorder status of F (Future order). **Future order** lines are reserved or backordered during the Evaluate Future Orders periodic process. The order is then selected for pick slip generation when the zone opens, since this date is the arrival date for the order line.



Alternate Zone Reservation Rules

Use Alternate Zone Reservation Logic (I52)

Prior to the season start date:

- The order line is taken as an open order, but is not reserved.
- The backorder status = F (Future order).
- The arrival date of the order = the zone start date.
- The system presents the [Display Zone Reservation Dates Window](#) if you have flagged the order type to display zone date windows.

After the season start date but prior to the zone start date:

- If the item has an available quantity or any open purchase orders:
 - The order line is taken as an open order, but is not reserved.
 - The backorder status = Z (Zone reservation).
 - The arrival date of the order line = the current date.
 - The system presents the [Display Zone Reservation Dates Window](#) if you have flagged the order type to display zone date windows.
- If the item has no available quantity or open purchase orders, the [Select Order Line Option Window](#) presents two options:

- Sell out the order line
- Take the order line as a future order (backorder status = F) with an arrival date = the next season's start date

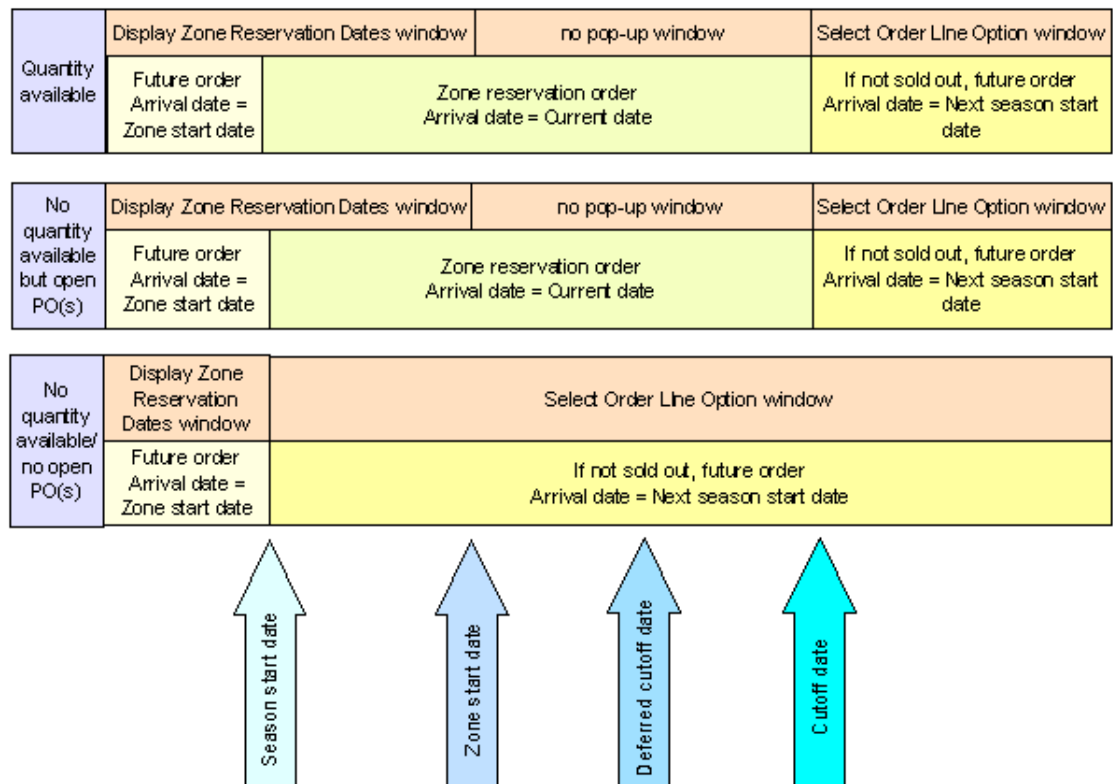
After the zone start date but prior to the cutoff date:

- If the item has an available quantity or any open purchase orders:
 - The order line is taken as an open order, but is not reserved.
 - The backorder status = Z (Zone reservation).
 - The arrival date of the order line = the current date.
- If the item has no available quantity or open purchase orders, the [Select Order Line Option Window](#) presents two options:
 - Sell out the order line
 - Take the order line as a future order (backorder status = F) with an arrival date = the next season's start date

After the cutoff date, the [Select Order Line Option Window](#) presents two options:

1. Sell out the order line
2. Take the order line as a future order (backorder status = F) with an arrival date = the next season's start date

Future orders: An order line taken outside the season as a future order will have a future *Arrival date* and a backorder status of F (Future order). [Future order](#) lines are reserved or backordered during the Evaluate Future Orders periodic process. The order is then selected for pick slip generation when the zone opens, since this date is the arrival date for the order line.



Pop-up Windows

Display Zone Reservation Dates Window

If you take an order before the start date: For zone reservation orders taken before the start date, the system displays zone reservation date information in an informational pop-up window.

Controlling the display of this window: This window displays automatically if the *Zone date windows* field for the order type is selected. For example, you might want to display this informational window for phone orders, but not for mail orders. See [Establishing Order Types \(WOTY\)](#).



Note:

This window displays only once during order entry if multiple items on the order have the same zone start date.

Select Order Line Option Window

If cutoff date has passed: The system displays this window if the item is eligible for zone reservation, but not available for shipment within the zone reservation dates based on the rules used in your company. See [Standard Zone Reservation Rules](#) and [Alternate Zone Reservation Rules](#) for a discussion of each.

Choosing an option: From this window, you can:

1. Enter 1 to sell out the order line, and close it immediately.
2. Enter 2 to add the item as a future order. The arrival date is the *Start* date of the next season's zone date window for this item in this zone, as specified through [Creating and Maintaining Zone Reservation Dates \(WZRD\)](#). Future orders do not fall under zone reservation rules. The order is reserved through the Evaluate Future Orders periodic function.



Note:

Depending on whether you use [Standard Zone Reservation Rules](#) or [Alternate Zone Reservation Rules](#) and the current date relative to the zone reservation dates, this window might display a slightly different message. For example, if you are using [Alternate Zone Reservation Rules](#), it is after the season start date, and there is no available or open PO quantity for the item, the window displays the message `Item is not currently available, select one of the following options`. However, the options are always the same, regardless of the situation which triggered the display of the window.

Overriding Zone Reservation Rules by Arrival Date

You can override zone reservation rules by overriding the order line's arrival date with a different date. Overriding the arrival date automatically updates the order priority to 9 (highest priority) if the [Auto Update Order Priority \(G45\)](#) field in the System Control table is selected. In addition, the override date works in the following ways:

- **Orders taken before the start of the season:** Zone reservation-coded items ordered before the Season start date, regardless of zone, are taken as future orders; the arrival date = the Start date of the zone date window. You can reserve, generate a pick slip for,

and ship the item sooner than this date by overriding the arrival date for the order line. If you enter a date that is within the [Reservation Lead Days \(B27\)](#) specified for your company, the item ceases to be a future order, and is reserved immediately if available.

- **Orders taken on or after the cutoff date:** Items ordered after the cutoff date are not taken for the current season, but you can choose to accept the order as a future order with an arrival date = the start date of the next season in which you sell the item. If there is stock available, you can reserve, generate a pick slip for, and ship the item sooner than this by overriding the arrival date for the order line. If you enter a date that is within the [Reservation Lead Days \(B27\)](#) specified for your company, the item ceases to be a future order, and is reserved immediately. When you generate pick slips for current orders this item may be included.
- **Otherwise, if stock is available:** Overriding the arrival date of a zone reservation-coded item (one added with a backorder status of Z (zoned reservation) and the order date as the arrival date) does not change the backorder status of the line; however, you can select this arrival date as a criterion for pick slip generation.

Zone Reservation Rules Summary

Additional Condition?	Zone Reservation Rule	Overriding Zone Reservation
Prior to season start date		
None	Zone reservation order line taken as future order Arrival date = zone start date Display Zone Reservation Dates Window if order type specifies	Override the <i>Arrival date</i> on the order line; if you enter a date that is within the Reservation Lead Days (B27) , the item ceases to be a future order, and is reserved immediately; otherwise, generate pick slip by <i>Priority</i> (if you have entered a date other than the current date) or <i>Arrival date</i> .
After season start date but prior to zone start date		
• the Use Alternate Zone Reservation Logic (I52) system control value is selected and there is an available or open PO quantity, or • the Use Alternate Zone Reservation Logic (I52) system control value is unselected	Zone reservation order line taken as open order Backorder status = Z Arrival date = current date Display Zone Reservation Dates Window if order type specifies	Override the <i>Arrival date</i> on the order line. Generate pick slip by <i>Priority</i> or <i>Arrival date</i> .
the Use Alternate Zone Reservation Logic (I52) system control value is selected and there is no available or open PO quantity	Select Order Line Option Window provides two options: 1. Sell out order line 2. Take the order as future order with arrival date = zone start date for the next season	Take order as future order.
After zone start date		

Additional Condition?	Zone Reservation Rule	Overriding Zone Reservation
- the Use Alternate Zone Reservation Logic (I52) system control value is selected and there is an available or open PO quantity, or - the Use Alternate Zone Reservation Logic (I52) system control value is unselected	Zone reservation order line taken as open order Backorder status = Z Arrival date = current date No pop-up window	Override <i>Arrival date</i> . Generate pick slip by <i>Priority</i> or <i>Arrival date</i> .
the Use Alternate Zone Reservation Logic (I52) system control value is selected and there is no available or open PO quantity	Select Order Line Option Window provides two options: - Sell out order line - Take the order as future order with arrival date = zone start date for the next season	Take order as future order.
After deferred cutoff date		
- the Use Alternate Zone Reservation Logic (I52) system control value is selected and there is an available or open PO quantity, or - the Use Alternate Zone Reservation Logic (I52) system control value is unselected and there is an available quantity	Zone reservation order line taken as open order Backorder status = Z Arrival date = current date No pop-up window	Override <i>Arrival date</i> . Generate pick slip by <i>Priority</i> or <i>Arrival date</i>
- the Use Alternate Zone Reservation Logic (I52) system control value is selected and there is no available or open PO quantity, or - the Use Alternate Zone Reservation Logic (I52) system control value is unselected and there is no available quantity	Select Order Line Option Window provides two options: - Sell out order line - Take the order as future order with arrival date = zone start date for the next season	Take order as future order.
After cutoff date		
none	Whether or not stock is available: Select Order Line Option Window provides two options: - Sell out order line - Take the order as future order with arrival date = zone start date for the next season	Take order as future order. Override <i>Arrival date</i> on order line; if new arrival date is within Reservation Lead Days (B27) and item is available, it is reserved; otherwise, generate pick slip by <i>Priority</i> (if you have entered a date other than the current date) or <i>Arrival date</i> .

Zone Reservation Setup

Overview: All of the values specified below must be set in order for zone reservation rules to apply to an item in order entry.

SKU table: The [Zone reservation code](#) field in the SKU table indicates whether or not an order line is processed under zone reservation rules.

Offer table: The *Season* field in the Offer table identifies the season linked to the offer. A zoned reservation item offered in more than one season (spring and fall, for example) has more than one set of date windows (spring date windows and fall date windows). The zone reservation program uses this information to identify which season's date windows to use. Only order lines whose offers are linked to a season are eligible for zone reservation rules. See [Working with Offers \(WOFR\)](#).

ZIP/City/State table or SCF table: The *Geographic zone* field in the ZIP/City/State table, or alternatively the *Geographic zone* field in the SCF table identifies the geographic zone of the ship-to address. You must specify a geographic zone for each ZIP code, or alternatively for each SCF code, to which you ship zone reservation items. You can specify a geographic zone for a range of ZIP codes on the [Update Postal Codes by Range Screen](#).

The *Geographic zone* in the ZIP/City/State table overrides the *Geographic zone* in the SCF table for zone reservation processing. The ZIP/City/State table is not company specific; zones assigned at the ZIP/City/State table applies to all companies in your system. You can define different geographic zones for different companies by leaving the *Geographic zone* field blank in the ZIP/City/State table and instead entering values in the *Geographic zone* field of the SCF table, which is specific to each company. See [Working with SCF Codes \(WSCF\)](#).

Either of these tables can supply the third required value for an order line to be eligible for processing under zone reservation rules.

System control values:

- [Bypass Geographic Zone Searching in Order Entry/Order Maintenance \(H55\)](#): must be unselected.
- Use Alternate Zone Reservation Logic (I52): controls whether the system uses [Standard Zone Reservation Rules](#) or [Alternate Zone Reservation Rules](#)
- [Auto Update Order Priority \(G45\)](#): updates to 9 the priority of any order on which the arrival date has been overwritten with a date other than the current date. This includes all zone reservation orders for which you have overridden the zone reservation arrival date. Orders with a priority of 9 takes precedence in pick slip generation if you specify *Priority* as a criterion.



Note:

You can update the priority of an order by changing the arrival date for the order, for the order ship to, or for the order detail. If you also want to change the shipping date for a zoned reservation item, you must change the arrival date on the [Work with Order Line Screen \(Changing/Adding an Item\)](#).

Other Optional Table Values

Order Type table: The *Zone date windows* flag in the Order Type table controls whether to display the [Display Zone Reservation Dates Window](#) in order entry when a zoned reservation item is ordered prior to the start date for the order's shipping zone. You might want to display this window for phone orders, for example, but not for mail orders. See [Establishing Order Types \(WOTY\)](#) for more information.

Season table: The *Start date* field in the Season table determines when a zoned reservation item ordered before its *Zone Start date* is flagged as a future order. The *Season Start date* must be earlier than the start date for any zone date windows. Zoned reservation items ordered before this earlier *Season Start date*, are processed as future orders with an arrival date = the zone window start date; they do not fall under zone reservation rules. If the season *Start date* is left blank, all orders taken before the zone reservation *Start date* fall under zone reservation rules.

The *End date* field in the season table is informational only. See [Working with Season Codes \(WSEA\)](#) for more information.

Order Ship-To table: The *Geographic zone* field in the order ship-to table is automatically populated during order entry for zoned reservation items, and can be used during pick slip generation as a selection criterion.

Reserving Items/Generating Pick Slips

Order lines which fall under zone reservation rules are not reserved or back ordered when the order is taken; they are reserved or back ordered when you generate pick slips, using option 10 (batch reservation). You can generate pick slips for zone reservation-coded items by selecting criteria such as geographic zones, SCF code range, arrival date range.

Zone Reservation/Long SKU Class

Zone reservation codes cannot be used as a selection option for pick slip generation; however, you can generate pick slips for specific long SKU classes. If you designate long SKU classes to parallel zone reservation codes, you can use this selection option to generate pick slips for items with a specific zone reservation code. See [Working with Long SKU Classes \(WLSC\)](#).

Other Information to Note

Backorder reservation: An item/SKU which has been assigned a zone reservation code is processed under zone reservation rules only if the additional requirements for the zone reservation program are in place; otherwise, a zone reservation-coded item follows the standard order entry process. However, a zone reservation-coded item which is backordered under standard order entry procedure is not reserved during backorder reservation (EBO ASYNC) or the Reserve Backorders periodic process even if stock is available. You can reserve backordered stock for these items through [Working with Interactive Reservation \(MIRV\)](#).

Generic order interface: If an item is subject to zone reservation, the system applies the [Standard Zone Reservation Rules](#) or [Alternate Zone Reservation Rules](#) based on your setup. However, if the zone reservation rules that apply to the item would normally display the [Select Order Line Option Window](#) in order entry, the system always adds the item as a future order.

If you are using the [Alternate Zone Reservation Rules](#) and you attempt to maintain or review a suspended order that does not yet have payment information, the order does not reflect the zone reservation rules. The zone reservation rules do not apply until the order goes through the editing process.

8

Installation Setup

- [Establishing Security](#)
- [Using the Menu Driver](#)
[System Control Values and Number Assignments](#)
- [Setting Up Secured Features](#)

Establishing Security

Topics in this part:

- [Security Shell Components](#) provides an overview of the security features on the system.
- [Working with Companies \(WCMP\)](#) describes how to create a company and control security by company.
- [Setting Up User Classes \(WUCL\)](#) describes how to create user classes and control access to menus and menu options by groups of users. This topic also describes how to assign authority to companies, menu options, secured features and user-defined functions for a user class.
- [Working with User Records \(WUSR\)](#) describes how to create user profiles and control access to menus and menu options by individual user. This topic also describes how to assign authority to companies, menu options, secured features and user-defined functions for an user individual user.
- [Working with Threshold Values \(WTHR\)](#) describes how to create threshold values for defined functions in the system.

Security Shell Components

Purpose: Some security features in the system are set by Order Administration, while others require decisions and planning by your system administrator or security officer. You are not required to use every security feature that the system offers. Your company procedures will determine which features you need to implement.

It is recommended that you read this entire topic before performing any security related activities. Since access to system options relies on the level of security each user is assigned, security implementation requires well thought-out procedures.

In this topic:

- [Understanding System Security](#)
- [Security Levels](#)
- [Security Considerations](#)
- [Security Requirements](#)
- [Companies](#)
- [User Records](#)

- [Optional Security Procedures](#)
- [Security Procedures](#)

Understanding System Security

Security Levels

Security is established in three aspects of the system:

- Application security
- Menu security
- Feature security

Application security: (Defined by Order Administration.) Order Administration delivers the software with a built-in security code you must enter to operate the software. This code is generated by Order Administration and is provided to you at installation time. At installation, the menu driver checks the code you enter against the Order Administration code. If a mismatch is found, the menu driver does not allow you to access the software.

Menu security: Menu security is initially defined by Order Administration, until you change authority levels when setting up user records (and user classes, if applicable).

Access to menus depends upon whether the system is delivered in a 'closed' or 'open' environment. In a closed environment, users are not allowed to access a menu option until they are granted authority. In an open environment, all users are allowed access to menu options unless they are specifically prohibited by the authority level in their user or user class record.

You establish authority to menu options through user records and, if applicable, to user classes. Access to companies, secured features, and user defined options is also established at the user and user class level.

Feature security: You can establish feature security by user and user class, and also by individual feature. A feature is a procedure or action that occurs within a function. For example, the ability to maintain batch totals and override prices in the Order Entry function are examples of secured features.

The system allows you to assign a company-wide authority level to a single secured feature. A feature's authority level (*ALLOW, *EXCLUDE, or *DISPLAY) replaces the need for passwords for these features. If you permit authority to all features in the system, all users can perform the feature unless a user is specifically excluded from a feature on the user record or user class level.

Security Considerations

Before you begin: Read this entire topic. You'll find that some security setup is required, while other features are optional (although you might consider some optional features important to your business). Certain features require prior setup before you can use others. For example, user classes are not required, but if you plan to use them, you must establish user classes before setting up your user records, which is a required component of the system.

What is required? First, you must have access to the system and define yourself as the system administrator in your user record (selected System Administrator field). This means that you have access to all menu options, system control values, and secured features on the system, and that you have the authority to create user records and assign authority levels. At a minimum, you must:

- Create your primary company (and other companies if you are working in a multi-company environment)

- Create user records for all personnel who will use the system and assign company authority
- Define the system control values necessary to the running of your company

What is optional?

- Creating user classes
- Assigning menu option, secured feature, and user defined authority to individual users or user classes
- Creating menu options
- Creating and tailoring menus
- Creating additional application areas and application groups
- Setting up user defined functions

Security Requirements

Purpose: The security components you must set up to use the system are companies, user records, and system control values.

For more information:

- [Working with Companies \(WCMP\)](#)
- [Working with User Records \(WUSR\)](#)
- [User Configuration](#) in the Administration Guide
- [System Control Table Components](#).

Companies

Companies are single, isolated sets of data: an organization's financial information, inventory, and customers. The majority of tables includes COMPANY in the key, so you can establish unique sets of data without having separate libraries, although you can use separate libraries if you wish

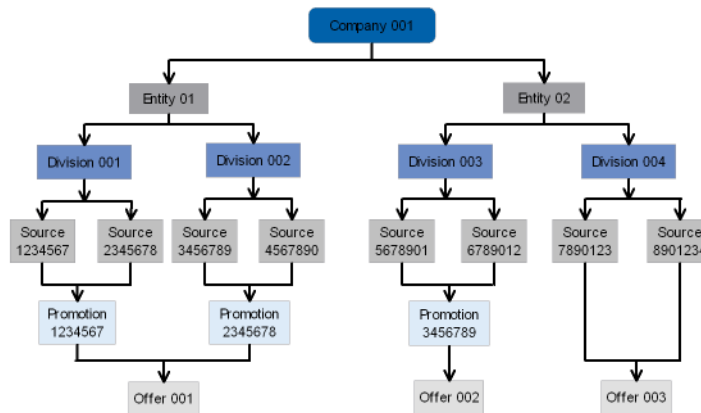
The tables that are not company-specific, but rather database-specific include:

- ZIP table. See [Setting Up the Zip/City/State \(Postal Code\) Table \(WZIP\)](#)
- Application Area table. See [Setting Up Application Areas](#)
- Application Group table. See [Setting Up Application Groups](#)
- Menu table. See [Customizing Menus \(WMNU\)](#)
- User table. See [Working with User Records \(WUSR\)](#)

If your company is providing fulfillment services for other companies, you can set up a separate company for each client you serve.

When should you create more than one company? You must create another company when you do not want data, (for example sales analysis figures, items, customers) to mix with another company's data. If you only want to separate sales analysis, you can handle that through entities and divisions. See [Sales Reporting Hierarchy](#)

Sales Reporting Hierarchy



User Records

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

What settings are in the user control record? The user control record (available through the Work with Users option) specifies the user's:

- ID code (the code that identifies the user to the system)
- authority to options available under My Jobs, My Docs, and Advanced Commands, including working with other user profiles or having access to other uses' jobs
- name
- user class (optional), such as customer service representative or warehouse staff
- default menu (the first menu that appears when the user signs on to the system)
- default company (the company where a user automatically works after signing on to the system)
- default authority level (indicating either default global access to or exclusion from menu options and secured features)
- whether the user advances automatically to the [Customer Selection Screen](#) in order entry
- authority to companies, menu options, secured features and user defined functions

Background: See [User Configuration](#) in the Administration Guide for step-by-step instructions on how to set up users, and for additional setup scenarios.

System Control table: The System Control table is where you define many of the processing characteristics of the system. The options in this table are used to control special system information, such as:

- How the system will calculate pricing in Order Entry
- How SKU information will appear
- Whether you will use Cart/Bin picking
- How you will assign purchase order numbers

The information defined in the System Control table is confidential and critical to the operation of your system. Access to the System Control table is restricted to users who have system administrator access. This table should not be available to all users.

Optional Security Procedures

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

See [Setting Up User Classes \(WUCL\)](#).

Why use user classes? If you want all your Order Entry operators to have the same level of authority and access to the system, you might want to create a user class where you define the defaults that will apply to all users in this class. As you create user records, you need only assign the user class that you have created to each Order Entry user record. In this manner, classes can be established and assigned for each group of users in your company.



Note:

The authority level assigned to an individual user's record always overrides the authority defined in the user class record.

Creating menu options: Order Administration delivers a complete set of menus and menu options, but allows you to create options for commands, programs, and processing functions that you can add to existing menus, or menus that you create through the [Customizing Menus \(WMNU\)](#) menu option.

If you plan on creating menu options, you will need to do this before you can add them to an existing menu.

Creating or customizing menus: The system allows you to create your own menus or customize existing menus, by adding menu options or changing the arrangement of options on a menu. While menus are organized according to application, you might want to create a menu that only includes the options to perform certain specific tasks, such as customer service activities.

Security Procedures

Security Component	Status
Create a user profile record establishing yourself as the System Administrator. See User Configuration in the Administration Guide.	Required
Create company if in a single company environment, or more than one if in a multi-company environment. See Working with Companies (WCMP) .	Required
Create user classes, if you plan to group users according to user class. See Setting Up User Classes (WUCL) .	Optional
Define system control values. See System Control Table Components .	Required
Define secured features. See Setting Up Secured Features .	Required
Define company authority. See Setting Up User Classes (WUCL) and Working with User Records (WUSR) .	Required
Define menu option authority. See Setting Up User Classes (WUCL) and Working with User Records (WUSR) .	Optional
Define secured feature authority. See Setting Up User Classes (WUCL) and Working with User Records (WUSR) .	Optional

Security Component	Status
Define user-function authority. Working with User Records (WUSR) .	Optional
Create menu options. Delivered with the system, although you can create others. See Setting Up Menu Options (WOPT) .	Optional
Create menus. Delivered with the system, although you can create others. Customizing Menus (WMNU) .	Optional
Create application groups. Setting Up Application Groups .	Optional
Create application areas. Delivered with the system, although you can create others. Setting Up Application Areas .	Optional

Using the Menu Driver

Topics in this part: The following topics describe how to create and customize menus for individual or groups of users.

- [Menu Driver Screen](#) describes the features and functions of the Menu Driver.
- [Setting Up Menu Options \(WOPT\)](#) describes how to create and change menu options and their descriptions.
- [Customizing Menus \(WMNU\)](#) describes how to create and change menus, copy menus, and define menu details.
- [Setting Up Application Areas](#) describes how to create and change application areas and their descriptions.
- [Setting Up Application Groups](#) describes how to create and change application groups and their descriptions.
- [Working with Announcements \(WANN\)](#) describes how to set up the announcements to display on the home menu.



Note:

This part assumes that the individual performing the tasks described here has the appropriate security and authority to access all features and functions. For information on system and application security and authority setup, see [Establishing Security](#).

The Menu Driver checks the initial security code provided by Order Management System at the time of installation. If a mismatch is found, the Menu Driver does not allow access to the software.

Menu Driver Screen

Purpose: You can use any menu in the system to advance to a different menu or a menu option, scan for menus and menu options, display current order statistics, and advance to administrative options.

Some important features of the menu driver include:

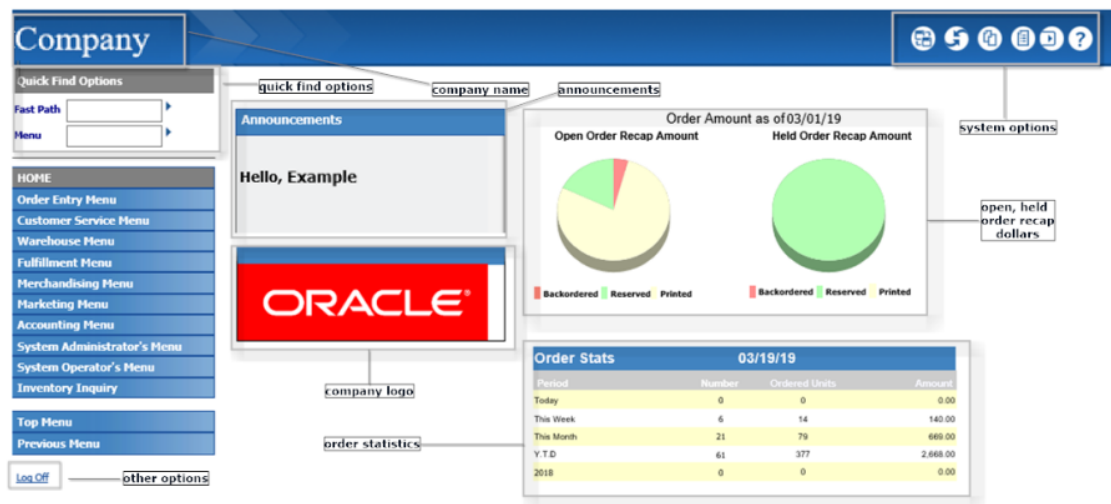
- Quick Find Options: Fast Path, Menu selection, and menu advancement

- Link to log out of Order Administration
- Announcements
- Charts depicting open and held order dollar totals
- Company logo and default company image
- Order and shipment statistics for the day, week, month, year, and previous year, or a company-specific image for users who do not have authority to view this information
- Standard icons to change companies, advance to administration screens (My Docs, My Jobs, My Forms), or open the online help
- If the current company is not flagged as an Active company, the screen displays a message: This company is flagged as inactive and should not be used to process live orders. See the [Change Company Screen](#) for information on setting this flag.

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

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

The [System Options](#) provide an option to advance to Modern View.



Note:

When you sign on to the system, you advance to your default menu. To display the HOME menu (if it is not your default menu, or to return to it from a different menu), enter HOME in the Menu field.

In this topic:

- [Quick Find Options](#)
- [Announcements](#)
- [Company Logo](#)
- [System Options](#)

- [Open, Held Order Recap Amounts](#)
- [Order Statistics](#)
- [Other Options](#)

Quick Find Options

Purpose: Use the quick find options to advance to a menu option or a menu.

Quick Find Options

Fast Path ▶

Menu ▶

HOME

Accounting Menu

Menu Maintenance

Purchase Order

Order Entry Menu

Periodic Processing Menu

Inventory

Background Jobs

Utilities Menu

Top Menu

Previous Menu

For more information: See Menu Driver Screen for the location of the quick find options, and links to other options available at the Menu Driver screen.

Field	Description
Fast Path	Use this field to enter a unique code for a menu option, providing direct access without advancing through the menus. Each option on the system has a Fast Path name. For example, if you enter MITM in the Fast Path field, you advance to Work with Items/SKUs. If you do not know the option name, you can click on the arrow. You advance to the Select Menu Options Window, where you can search and select the desired option. When accessible to the user, the Fast Path and Menu fields can be displayed or hidden by selecting Toggle Fast Path/Menu. The Fast Path setting in the user's record controls whether menus display the Fast Path field. See User Configuration in the Administration Guide. Modern View options: Menu options with a Type of Modern View are not available in Order Administration Classic View. If you enter the Fast Path for a Modern View option, the screen displays an error. Alphanumeric, 4 positions; optional.

Field	Description
Menu	Use this field to enter a unique menu name to advance it directly without advancing through the menu tree. For example, if you enter INVENTORY in the Menu field, you advance to the Inventory Menu. If you do not know the menu name, you can click on the arrow to advance to the Select Menu Window, where you can search and select the desired menu. The Fast Path setting in the user's record controls whether menus display the Menu field. See User Configuration in the Administration Guide. Alphanumeric, 10 positions; optional.
Menu	The short name of the current menu. Alphanumeric, 10 positions; display-only.
Menu names	Use the links below the current menu name to advance through the menu tree to select a different menu or a menu option. The description of each menu or menu option assigned to the current menu through the Customizing Menus (WMNU) option is available for selection. For example, the Periodic Processing menu is assigned to the HOME menu. If you select this menu, the menus and menu options assigned to the Periodic Processing menu (such as Work with Periodic Processes) are listed. See Customizing Menus (WMNU) for information on assigning menus and menu options to menus. Modern View options: Menu options with a Type of Modern View are not available in Order Administration Classic View, and are not displayed if they are included in the current menu. Menu description: alphanumeric, 20 positions; optional. Menu option description: alphanumeric, 40 positions; optional.
Top Menu	Use this option to return to the Default menu from your user profile, as set up through Working with User Records (WUSR). See User Configuration in the Administration Guide for background.
Previous Menu	Use this option to return to the previously displayed menu.

Announcements

Purpose: [Working with User Records \(WUSR\)](#)), and any announcements that you have set up through the [Working with Announcements \(WANN\)](#) menu option.

For more information: See [Working with Announcements \(WANN\)](#) for a discussion, and see Menu Driver Screen for the location of the announcements, and links to other options available at the Menu Driver screen.

Company Logo

Purpose: This area of the menu screen displays the company logo, if one has been set up; otherwise, the Oracle default company logo displays if you have not set up a company logo.



See [Setting Up Company Logos for Menu Screens and the Modern View Home Page](#) for setup information, and see the Menu Driver Screen for the location of the company logo on the screen, and for links to other options available at the Menu Driver screen.

System Options

Purpose: The upper right area of the menu screen includes various system options and information.



The system options, described below, are available at many other screens throughout Order Administration.

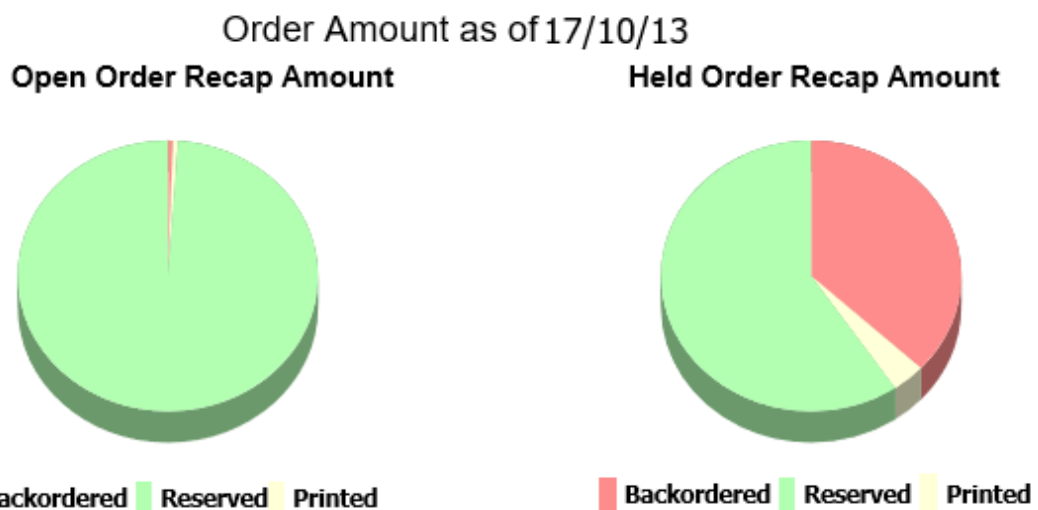
Option	Description
Modern View 	Select this option to advance to Modern View, including the Contact Center. This option is not available at all screens. For example, it is available at the menu screen and at the initial search screen in order inquiry, but not at any subsequent screens in order inquiry. Retain company? When you advance to Modern View, the currently selected company is retained. For example, if your default company is company 2 but you had previously selected company 1, when you advance to Modern View, company 1 is retained. However, if you select a different company in Modern View, when you return from Modern View to Classic View, the company selected in Modern View is not retained. For example, if you were working in company 1 in Classic View and then selected company 2 in Modern View, you return to company 1 in Classic View. Note: If you do not have sufficient authority to review or work with orders, no customer or order search options are available. Contact your system administrator if this occurs.
Change Company 	Select this option to display the Select Company window, where you can select another company to work in. Your user profile controls the companies available for selection at this window; See User Configuration in the Administration Guide for more information. This option is not available at all screens. For example, it is available at the menu screen and at the initial search screen in order inquiry, but not at any subsequent screens in order inquiry.
My Docs 	Select this option to advance to the Document Management (My Docs) screen.
My Jobs 	Select this option to advance to the Job Management (My Jobs) screen.
My Forms 	Select this option to advance to the Forms Management (My Forms) screen.

Option	Description
Help 	Select this option to display the online help in a separate browser window. When you select this option from a menu screen, it displays the Contents page. Trouble with online help? If online help pages are slow to load or if the search function doesn't work correctly, try clearing the browser's cache or history.

For more information: See the Menu Driver Screen for the location of the system options, and links to other options available at the Menu Driver screen.

Open, Held Order Recap Amounts

Purpose: These pie charts on the menu screen provide a graphical “snapshot” of your open and held orders as of the last time the Batch Order Control (ORD_CONTRL) job ran on or since the displayed current date.



Operations Control totals: These totals are also available for review at the [First Operations Control Summary Screen](#) in the [Reviewing Operations Control Summary \(FLSH\)](#) menu option.

User authority to order totals: The [Display Order Statistics and Recap \(J03\)](#) secured feature controls whether a user sees these totals and the [Order Statistics](#), a default company-specific image, or a blank area. See [Setting Up Menu Driver Images for Companies](#) for more information on setting up these images for users who do not have authority to view the open and held order totals.

Date displayed: The current date always displays in the user's date format.

Example: Today is August 27, and the charts display the Order Recap information from the [First Operations Control Summary Screen](#) as of the last time you ran the Batch Order Control job today. If the current time is 10:00 a.m. and you last ran the Batch Order Control job at 8:30 a.m., the charts display the totals from 8:30.

Updating the totals: If you use the [Reviewing Operations Control Summary \(FLSH\)](#) menu option to update current totals, the system submits the Batch Order Control job. Until this job has finished running, the totals will not be accurate. You can refresh (press F5) or review the job status at the [Job Management \(My Jobs\)](#) screen. There are also situations when the Batch Order Control job starts automatically; see [Reviewing Operations Control Summary \(FLSH\)](#) for an overview.

Totals mapping: Each of the totals that make up the pie charts is also listed on the bottom half of the [First Operations Control Summary Screen](#):

- Open Order Recap Amount pie chart
 - Backordered = [OBO \(Open/backordered\)](#) amounts
 - Printed = [Opn/Prt \(Open/Printed\)](#) amounts
 - Reserved = [Opn/Rsv \(Open/reserved\)](#) amounts
- Held Order Recap Amount pie chart:
 - Backordered = [HBO \(Held/backordered\)](#) amounts
 - Printed = [Hld/Prt \(Held/printed\)](#) amounts
 - Reserved = [Hld/Rsv \(Held/reserved\)](#) amounts

For more information: See Reviewing Operations Control Summary (FLSH) for background on Order Control Summary processing, and see Menu Driver Screen for the location of the Open, Held Order Recap Amount pie charts, and links to other options available at the Menu Driver screen.



Note:

This area of the Home screen is blank when you select a company that does not yet have any existing orders.

Order Statistics

The setting of the FLASHPIECHARTS setting in [Working with Customer Properties \(PROP\)](#) defines the order statistics that display on the Menu Driver Screen.

- FLASHPIECHARTS = The order statistics section of the menu screen displays total numbers and amounts of orders created by the current date, current week, current month, year to date, and previous year. Use this setting if the [Delay Billing Updates \(K85\)](#) system control value is selected.

Order Stats		17/11/16	
Period	Number	Ordered Units	Amount
Today	0	0	0.00
This Week	0	0	0.00
This Month	0	0	0.00
Y.T.D	315	690	46,526.24
2016	86	141	2,062.42

- FLASHPIECHARTSFULL = The order statistics section of the menu screen displays total numbers and amounts of orders created and shipped by the current date, current week, current month, year to date, and previous year. Use this setting if the [Delay Billing Updates \(K85\)](#) system control value is unselected.

Order Stats		17/11/16		
Period	Ordered		Shipped	
	Number	Amount	Number	Amount
Today	7	4,764.14	0	0.00
This Week	70	122,397.86	0	0.00
This Month	102	159,222.07	19	5,541.54
Y.T.D	217	175,382.16	25	5,750.91
2016	108	20,620.85	31	7,465.33

User authority to order statistics: The Display Order Statistics and Recap (J03) secured feature controls whether a user sees these statistics and the [Open, Held Order Recap Amounts](#), a default company-specific image, or a blank area. See [Setting Up Menu Driver Images for Companies](#) for more information on setting up these images for users who do not have authority to view order statistics.

Date displayed: The date always displays in the user's date format.

Continuous order updates: The background jobs update the totals displayed here throughout the day as you create and ship orders. This information corresponds to the Ord and Shp totals displayed on the top half of the [First Operations Control Summary Screen](#) in the [Reviewing Operations Control Summary \(FLSH\)](#) menu option. These totals do not include other types of order activity, such as cancels, returns, or selling out an existing order line.

Totals mapping: Each of the totals listed in the Order Statistics area is also listed on the top half of the [First Operations Control Summary Screen](#):

- Ordered
 - Number = [Ord \(Orders\)](#) Orders
 - Amount = [Ord \(Orders\)](#) Amounts
- Shipped
 - Number = [Shp \(Shipped\)](#) Orders
 - Amount = [Shp \(Shipped\)](#) Amounts

See the First Operations Control Summary Screen for more information.

Calculation of time periods: The time periods listed in the Order Statistics area are calculated as follows:

Date	Description
Today	The current system date.
This week	The current week runs from Monday through Sunday, and the totals displayed include all days for this period. Week crosses months and years: The calculation of totals for This week occurs regardless of whether a new month starts during the week. Example: Today is Sunday June 3. The totals displayed under This week include Monday May 28 through the current date.
This month	The totals for the current month.
Y.T.D.	The totals year-to-date.

Date	Description
Previous year (field name varies depending on the current year)	The totals for the previous year.

For more information: See Reviewing Operations Control Summary (FLSH) for background on the calculation of these totals, and see Menu Driver Screen for the location of the Order Statistics and links to other options available at the Menu Driver screen. Also, see [Sales Summary \(DSSS\)](#) for a menu option you can use to review shipment totals by date, week, or month, including the current day's totals broken out by order type and entity.

Other Options

Purpose: These additional options are:

- Log Off: Use this option to exit Order Administration and display the login screen.
- My Profile: Use this option to advance to the User Control screen. From this screen, you can change other user control records if you have the proper authority. The My Profile option is not available if you are using Oracle Identity Cloud Service for password authentication.

Setting Up Application Areas

Purpose: Application areas and application groups are used to group similar menu options, system control values and secured features.

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

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

When the software is delivered to you, Order Administration will have assigned application areas and application groups to menu options, system control values, and secured features in an effort to group these parameters and options by functional area.

Example: If you enter O/E in the Appl Area field and FRT in the Appl Group field, all options included within the Order Entry application area that relate to freight appear on the screen.

In this topic:

- [Work with System Values/Features Screen](#)
- [Create Application Area Screen](#)



Note:

Setting up application areas is not required to use the system. Application areas are helpful in sorting the many options the system provides by related function.

Work with System/Values Feature Screen

Purpose: Use this screen to review some of the application areas delivered with the system.

How to display this screen: Enter WSYS in the Fast path field at the top of a menu or select Work with System Values/Features from a menu.

Field	Description
Code	A code for the application area. Alphanumeric, 3 positions; optional.
Description	The application area description. Alphanumeric, 30 positions; optional.

Screen Options	Procedure
Create an application area	Select Create to advance to Create Application Area Screen
Change an application area	Select Change for an application area to advance to the Change Application Area screen. At this screen, you can only change the application area code description. See Create Application Area Screen for field descriptions.
Delete an application area	Select Delete for an application area to delete it.
Display an application area	Select Display for an application area to advance to the Display Application Area screen. You cannot change any information on this screen. See Create Application Area Screen for field descriptions.
Work with system control values	Select Control Values for an application area to advance to the Work with System Control Values Screen .
Work with secured features	Select Secured Features for an application area to advance to the Work with Secure Features Screen .
Work with application groups	Select Application Group for an application area to advance to the Work with Application Group Screen .
Work with menu options	Select Menu Options for an application area to advance to the Work with Menu Options Screen .
Work with system control values by SCV code	Select SCV/Code to advance to the Work with System Control Values by Code Screen

Create Application Area Screen

Purpose: Use this screen to create an application area.

How to display this screen: Select Create on the [Work with System Values/Features Screen](#).

Field	Description
Code	The code that identifies this application area. This code can be used to sort menu options, system control values, and secured features. Example: O/E has been defined as the application area for Order Entry. Alphanumeric, 3 positions; required.
Area description	The description of this application area. Alphanumeric, 30 positions required.

Setting Up Application Groups

Purpose: You can use the Work With Application Group screen to create and change application groups and their descriptions.

Application areas and application groups are used to group similar menu options, system control values and secured features.

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

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

When the software is delivered to you, Order Administration will have assigned application areas and application groups to menu options, system control values, and secured features in an effort to group these parameters and options by functional area.

Example: If you enter O/E in the Appl Area field and FRT in the Appl Group field, all options included within the Order Entry application area that relate to freight appear on the screen.

In this topic:

- [Work with Application Group Screen](#)
- [Create Application Group Screen](#)



Note:

Setting up application groups is not a required procedure in order to use the system. Application groups are helpful in sorting the many options the system provides by the feature to which they relate within an application area.

Work with Application Group Screen

How to display this screen: Select Application Group for an application area at the [Work with System Values/Features Screen](#).

Field	Description
Group Code	A code for the application group. Alphanumeric, 3 positions; optional.
Group description	The application group description. Alphanumeric, 30 positions; optional.

Screen Options	Procedure
Create an application group	Select Create to advance to Create Application Group Screen .
Change an application group	Select Change for an application group to advance to the Change Application Group screen. At this screen, you can only change the application group description. See Create Application Group Screen for field descriptions.

Screen Options	Procedure
Delete an application group	Select Delete for an application group to delete it.
Display an application group	Select Display for an application group to advance to the Display Application Group screen. You cannot change any information on this screen. See Create Application Group Screen for field descriptions.

Create Application Group Screen

Purpose: Use this screen to create an application group.

How to display this screen: Select Create on the [Work with Application Group Screen](#). The application area to which this application group has been assigned, displays automatically.

Field	Description
Application area	The application area to which this option belongs. Application areas are categorized according to application/function (such as Customer Service, Order Entry etc.). Application areas allow you to sort menu options according to the application area to which they belong. Alphanumeric, 30 positions; display only.
Group Code	The code that identifies this application group. This code can be used to sort menu options, system control values, and secured features. Alphanumeric, 3 positions; required.
Group description	The description of this application group. An application group is a secondary category within an application area and sorts functions according to the feature to which they relate. Alphanumeric, 30 positions required.

9

Marketing

- [Setting Up Offer Information](#)
- [Setting Up Pricing Information](#)
- [Reviewing Forecasting Information](#)
- [Using House List Options](#)

Setting Up Offer Information

Topics in this part: The following topics describe how to set up and change offer information:

- [Introducing Offer and Source Codes](#) provides an overview of the steps you need to follow and the basic information you need to set up an offer.
- [Working with Offers \(WOFR\)](#) describes how to create and change offer information, set up free gifts, freight charges, service charges, and discounts for an offer.
- [Working with Season Codes \(WSEA\)](#) describes how to create and change season information.
- [Working with Promotions \(WPRO\)](#) describes how to create and change promotion value information, which is used in Source Code reporting.
- [Working with Source Categories \(WSCT\)](#) describes how to create and change source categories, which are used for source code reporting.
- [Working with Source Codes \(WSRC\)](#) describes how to create and change source code information, review source code history, set up free gifts, freight charges, service charges, and discounts for a source code.
- [Working with Dollar Chart by Offer \(WDCO\)](#) describes how to establish dollar discounts by offer.
- [Working with Dollar Chart by Source Code \(WDCS\)](#) describes how to establish dollar discounts by source code.
- [Initializing an Offer \(MOFI\)](#) describes how to save and then delete order history for an offer, and transfer data from one offer to another.
- [Working with Special Pricing by Source Code \(WSPP\)](#) describes how to define special price breaks for multiple items and/or source code quickly.
- [Generating Source Codes Using the Source Upload Table \(WSRW\)](#) explains how to create an Order Administration source code using information from the Source Code Work file.

Introducing Offer and Source Codes

Purpose: This topic contains a brief overview of the offer and source code tables, including how to select them and set them up. The offer and source code tables must be set up before you can set up pricing information.

A reporting hierarchy showing the relationship between offers, source codes, and other Marketing tables is presented at the end of this topic.

You need to create a record for every offer (catalog, space ad, TV ad) for which you accept orders. Information for each field on the offer record is not provided here. Only information that you may need from other tables in order to set up an offer is presented here.

Setting up Offers

	Use in	Related Menu Option
Season codes	produce reporting and analysis by season	Working with Season Codes (WSEA)
Additional charge codes	add service charges defined in the offer or with Working with Dollar Chart by Offer (WDCO)	Establishing Additional Charge Codes (WADC)
Currency	required if you process orders in multiple currencies (the Multi Currency by Offer (E03) system control value <i>selected</i>).	Working with Currency (WCUR)

Other information that you can add using the Work with Offers function includes:

- Free gift items
- Freight by dollar chart
- Flat freight by offer (set the source code freight method to *F*, flat rate by ship-to)
- Service charges by dollar chart
- Dollar discounts

Setting up Source Codes

You need to create source codes for all of the offers that generate orders. Source codes control the pricing and freight methods used on the order.

Information for each field on the source code record is not provided here. Only included is information that you may need from other tables in order to set up a source code, or information that needs to be set up in other tables in order for some feature to work. For example, all pricing methods are not discussed -- only those that send you to another table.

See [Working with Source Codes \(WSRC\)](#).

Divisions

You can create your divisions before you set up source codes ([Working with Divisions \(WDIV\)](#)) or while you are using [Working with Source Codes \(WSRC\)](#). You *click* on the arrow in the Division field and when the Select Division pop-up window displays you can select *Create* to create a division.

Creating a division requires that you have already created entities ([Working with Entities \(WENT\)](#)).

Offer Codes

You can create your offers before you set up source codes ([Working with Offers \(WOFR\)](#)) or while you are using [Working with Source Codes \(WSRC\)](#). *Click* on the arrow to prompt a pop-up window and select *Create* for a code.

Source Category Codes

You can create your category codes before you set up source codes [Working with Source Categories \(WSCT\)](#) or while you are using [Working with Source Codes \(WSRC\)](#). *Click* on the arrow to prompt a pop-up window and select *Create* for a code.

Pricing Method

You need to determine how pricing will be calculated for orders for a source code. The *Reg Hierarchy* and *Reg Plus Reprice* pricing methods require that the [Pricing Values \(B31\)](#) parameters in the System Control table (WSYS) be established for these pricing methods to work.

Freight Charges

You can use one of the following freight methods to add freight to an order.

Freight Method	Description
Order Level Freight Methods:	
Dollar chart by offer (	Allows you to charge freight based on the dollar amount of the merchandise ordered for each shipping address on an order.
	 Note: If the Include Handling in Freight Charge Calculation (D77) system control value is selected, the system will also include handling along with merchandise in the freight charge calculation.
	To use: • Select <i>\$ Chart by Ofr</i> in the Freight method field in Working with Source Codes (WSRC). • Define the dollar tier levels and the corresponding freight charges in Working with Dollar Chart by Offer (WDCO).
Dollar chart by source (	Allows you to charge freight or service charges based on the dollar amount of the merchandise ordered for each shipping address on an order.
	 Note: If the Include Handling in Freight Charge Calculation (D77) system control value is selected, the system will also include handling along with merchandise in the freight charge calculation.
	To use: • Select <i>\$ Chart by Src</i> in the Freight method field in Working with Source Codes (WSRC) • Define the dollar tier levels and the corresponding freight or service charges in Working with Dollar Chart by Source Code (WDCS).

Freight Method	Description
Actual billing amount (	Uses the total weight of all the items on the order and the shipper to determine the actual freight charge during Confirmation or Billing. The actual freight charge is determined by: • Entering the freight manually using the Meter charge field in Manually Confirming Shipments (MCON). The system then recalculates the order totals based on any new or additional freight amounts. To use: Select <i>Actual Bill Amt</i> in the Freight method field in Working with Source Codes (WSRC)
Flat rate by ship-to (	Uses the flat freight amount defined for the source code as the amount of freight to charge a customer on an order. If a flat freight amount is not defined for the source code, the system uses the flat freight amount defined for the offer as the amount of freight to charge the customer on an order. To use: • Select <i>Flat Rt/Ship To</i> in the Freight method field in Working with Source Codes (WSRC). • Enter an amount in the Flat Freight Rate field in Working with Offers (WOFR), or • Enter an amount in the Flat amt (Flat amount) field in Working with Source Codes (WSRC)
Percentage by source (	Multiplies the merchandise amount of the order by a freight percentage defined for the source code, rounding up or down to the nearing two-position decimal. This method also considers the freight minimum and freight maximum defined for the source code. The system adjusts the freight fee to the maximum or minimum charge if the calculation results in a freight fee over or under the maximum or minimum value.

 Note:

If the Include Handling in Freight Charge Calculation (D77) system control value is selected, the system will also include handling along with merchandise in the freight charge calculation.

To use:

- Select *\$ Source* in the Freight method field in Working with Source Codes (WSRC).
- Enter a percentage in the Freight % (Freight percentage) field in Working with Source Codes (WSRC).
- Enter an amount in the Frt min (Freight minimum) and Frt max (Freight maximum) fields in [Working with Source Codes \(WSRC\)](#).

Freight Method	Description
Percentage by ship via (	Multiplies the merchandise amount of the order by freight percentage defined for the shipper, rounding up or down to the nearest two-position decimal. This method also considers the freight minimum and freight maximum defined for the shipper. The system adjusts the freight fee to the maximum or minimum charge if the calculation results in a freight fee over or under the maximum or minimum value.

 Note:

If the Include Handling in Freight Charge Calculation (D77) system control value is selected, the system will also include handling along with merchandise in the freight charge calculation.

To use:

- . Select % *Ship Via* in the Freight method field in Working with Source Codes (WSRC).
- . Enter a percentage in the Freight percent field in Working with Ship Via Codes (WVIA).
- Enter an amount in the Freight minimum and Freight maximum fields in Working with Ship Via Codes (WVIA).

Recipient freight

Calculates freight by dollar based on the merchandise total of the order including all recipient orders. The Maximum number of ship to's field defined for the source code is checked. If the number of recipients on the order is less than or equal to this value, the Dollar Chart by Offer will determine the freight fee, based on the merchandise total.

Once the maximum number of recipient orders is reached, the system includes a flat amount with the freight amount for each additional recipient order.

 Note:

If the Include Handling in Freight Charge Calculation (D77) system control value is selected, the system will also include handling along with merchandise in the freight charge calculation.

To use:

- Select *Recipient* in the Freight method field in Working with Source Codes (WSRC).
- Enter a number in the Max shp tos-frt (Maximum ship to's, freight) field in Working with Source Codes (WSRC)
- Enter an amount in the Flat amt (Flat amount) field in Working with Source Codes (WSRC).
- Define freight by dollar in Working with Dollar Chart by Offer (WDCO).

Freight Method	Description
	<i>Recipient freight example</i> Maximum ship to's freight = 2 Flat amount = 10.00 Dollar chart by offer (WDCO) dollar amount \$10.00 = freight charge 1.00 dollar amount \$20.00 = freight charge 2.00 dollar amount \$30.00 = freight charge 3.00 An order contains 3 recipients: 1st recipient: merchandise amount = 10.00, freight amount = 1.00 2nd recipient: merchandise amount = 10.00, freight amount = 1.00 3rd recipient: merchandise amount = 10.00, freight amount = 11.00 (flat amount + freight) Total freight across recipients = 13.00
By Offer Price freight	Uses a dollar chart by offer to calculate freight, based on the total merchandise value of the order. For this freight method, the merchandise value is calculated by adding the extended single-unit offer price for each item/SKU, disregarding any discounts, associate pricing, price overrides, quantity break pricing, etc. <i>Prorate freight?</i> If the <u>Prorate Freight Charges (D39)</u> system control value is selected, freight will be prorated based on the percentage of the merchandise total shipped, rather than on the appropriate level on the dollar chart. See the Prorate Freight Charges (D39) system control value for examples. <i>No-charge items:</i> Even items that are added to the order at no charge, such as package inserts identified through <u>Package Insert Processing (WPIP)</u> are included in the merchandise total for the purposes of calculating freight. <i>Freight-exempt items:</i> Items that you identify as freight-exempt through the <u>Working with Freight Exempt Items (WFEI)</u> menu option are not included if the <u>Use Item Freight Exemption File (E73)</u> system control value is selected.

Freight Method	Description
	<i>Tax-inclusive pricing:</i> If the order uses tax-inclusive pricing, the system uses the tax-inclusive offer price rather than the regular offer price to determine the total merchandise value. See the Tax Included in Price (E70) system control value for more information. <i>Include handling?</i> If the Include Handling in Freight Charge Calculation (D77) system control value is selected, then any handling charges will be added to the merchandise total for the purpose of determining the freight charge. <i>Override item offer price?</i> If you add an item to the order using a price override reason code whose Override item offer price flag is selected, then the Offer price stored in the Order Detail table is set to the actual price charged for the item. In this situation, the system uses the actual price as the offer price for the purposes of calculating freight by offer price. See Establishing Price Override Reason Codes (WPOR) for more information on price override reason codes.

 Note:

If the Include Handling in Freight Charge Calculation (D77) system control value is selected, the system will also include handling along with merchandise in the freight charge calculation.

To use:

- Select *By Offer Price* in the Freight method field in Working with Source Codes (WSRC).
- Define a dollar chart in Working with Dollar Chart by Offer (WDCO).
- Create an item/offer or SKU/offer (*MITM*).

Freight Method	Description
Freight by order weight (	This freight method is based on the total weight of the order and the number of cartons required to ship the order. The system uses the following information to calculate freight: - the total weight of the items. - the maximum weight you can pack in each carton. - the extra weight to add for each carton. The system calculates the total number of cartons required to ship the order and the expected weight of each using the above information. The system then uses the freight table defined for the source code to calculate the rate to charge for each carton. If the item is a ship-alone item, the system determines the weight for each unit and adds an extra weight amount before checking the freight table. See Working with Weight Tables for Order Weight (WFTB) for more information on how to define freight tables and examples of how this freight method is calculated. When calculated: In order entry, the system calculates freight by order weight during repricing, the initial and final order accept, and when you select to change the last line on the order if you do not change its order quantity. The Freight field on the order does not include order weight freight charges as you add lines to the order; however, the system does display ship via service charges and ship via weight charges immediately. When the system calculates freight by order weight, the system updates the Freight field for the order with the complete freight amount. In order maintenance, the system calculates freight by order weight as you add or change each line on the order. The Freight field on the order includes all freight charges as changes to freight are made to the order. To use: - Select <i>Order Weight</i> in the <i>Freight method</i> field in Working with Source Codes (WSRC) - Define a weight table in Working with Weight Tables for Order Weight (WFTB). - Enter the weight table in the Freight table field in Working with Source Codes (WSRC). - Enter a weight for each item in the <i>Sell wgt. (Selling weight)</i> field in Enter/Maintain Items (MITM). - Enter a weight in the Maximum carton weight field in Working with Ship Via Codes (WVIA). Enter a weight in the Extra Weight for Order Weight Freight Method (D85) system control value.

Line Level Freight Methods:

Flat rate by item (

Allows you to charge one freight amount per item, regardless of the quantity ordered of the item. The freight amount is defined for each item in the Item Offer or SKU Offer table. The freight total represents the accumulation of each item's flat freight fee.

To use:

- Select *Flat Rt/Item* in the *Freight method* field in [Working with Source Codes \(WSRC\)](#).
- . Enter a freight amount in the Freight field for each item in the Item Offer or SKU Offer (*MITM*).

Freight Method	Description
Flat rate by quantity (	Allows you to charge a flat rate for a certain number of units ordered and add an additional charge for each unit thereafter. The calculation is: $\text{Flat amt} + ((\text{Qty ord} - \text{Up to Frt Qty}) * \text{Secondary freight})$ To use: • Select <i>Flat Rt/Qty</i> in the <i>Freight method</i> field in Working with Source Codes (WSRC). • Enter an amount in the <i>Flat amt</i> (Flat amount) field in Working with Source Codes (WSRC). • Enter a number in the <i>Up to frt qty</i> (Up to freight quantity) field in Working with Source Codes (WSRC). • Enter an amount in the <i>Secondary frt</i> (Secondary freight) field in Working with Source Codes (WSRC).
Flat rate by item source (	Uses a flat freight charge for each unit ordered multiplied by the number of units ordered. To use: • Select <i>Flat Rt/Itm Src</i> in the <i>Freight method</i> field in Working with Source Codes (WSRC). • Enter an amount in the <i>Flat amt</i> (Flat amount) field in Working with Source Codes (WSRC).
Item (	Uses the freight amount for the item offer or SKU offer, multiplied by the quantity ordered. To use: • Select <i>By Item</i> in the <i>Freight method</i> field in Working with Source Codes (WSRC). • Enter an amount in the <i>Freight</i> field for the item offer or SKU offer (<i>MITM</i>).
Weight freight	This freight method uses the weight of each item and the rate for the shipper. The weight of the item is multiplied by the quantity ordered to calculate the total weight for the order line. In order to determine the freight charge, the system references the associated rate chart for each line, based on the total weight and delivery zone. The total weight is rounded up for the purposes of freight by weight if the partial pound is .50 or more; otherwise, the total weight is rounded down. For example, if the total weight is 3.51 pounds, the 4 pound rate is used; if the total weight is 3.49 pounds, the 3 pound rate is used. Because partial pounds of .49 or lower are rounded down, no freight will be added to the order if the total weight is under a half pound. <i>Example:</i> You are shipping an order to a business address in zip code 01760. The ship via on the order is 1, and the total weight of the shipment is 4.5 pounds. The shipping rate for ship via 1, zone 01 (for 01760), and 5 pounds is \$2.00. If the total shipping weight in the above example were 4.4 pounds, the system would round this total down and use the 4 pound shipping rate. To use: • Select <i>Weight</i> in the <i>Freight method</i> field in Working with Source Codes (WSRC). • Enter a sell weight for each item in Enter/Maintain Items (<i>MITM</i>). • . Define shipping rates for each ship via in Working with Shipping Rates (WSHR).

Promotional Codes

If you want to collect data at the promotion code level, create promotion codes before you set up source codes [Working with Promotions \(WPRO\)](#). Promotion codes give another level of reporting between source codes and offers.

You can also use promotion codes to:

- display a pop-up message in order entry
- apply a merchandise, freight, or additional freight discount in order entry
- override the ship via in order entry

Other information that can be added using Working with Source Codes (WSRC):

- Item special pricing
- Free gift items
- Freight by dollar chart
- Service charges by dollar chart
- Dollar discounts

For more information: See [Working with Entities \(WENT\)](#) for the Order Administration sales reporting hierarchy.

About Messaging Promotions

Purpose: You can use a promotion to display a pop-up message in order entry by:

- entering up to four lines of pop-up message text for the promotion code through the Work with Promotion Values menu option;
- assigning the promotion code to one or more source codes through the Work with Source Codes menu option.

When you have entered header information for an order whose source code is associated with the promotion, the promotional pop-up window opens. The window opens only for the range of dates you specify for the promotion. If you also set up pop-up window messages for the source code, this window opens first, and then the window with the promotion window opens.

Single promotion message: You can set up only one promotion message to display in order entry for each source code.

Message-only promotions through the order API: If the CWOOrderIn message specifies a message-only promotion and the [Allow Manual Entry of Promotion Code \(I63\)](#) system control value is *selected*, the message-only promotion applies to the order and the API writes an Order Transaction History message, such as `SPRING13 - CHECK OUT OUR SPRING SPECIALS applied by web`. These messages are available for review at the [Display Order History Screen](#). See the *Generic Order Interface (Order API)* for background on using the order API.

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

Message plus discount: You can set up a promotion that will both display a pop-up message and apply a discount to the order. See [About Discount Promotions](#)

About Discount Promotions

Purpose: You can set up the following types of discount promotions:

- **BOGO (Buy One Get One):** A discount amount or percentage, a special price, or free gift earned by ordering:
 - a quantity in a particular item category or of a particular item or SKU: *BOGO (Buy One/Get One) Discount or Free Gift by Item Category or Item*
 - a quantity or dollar value of items assigned to a particular price code: see *BOGO (Buy One/Get One) Discount or Free Gift by Price Code*
- *Item Category Discount:* A discount amount or percentage, or special price, applied to merchandise within a particular item category or multiple item categories.
- *Order Discount:* A discount amount or percentage applied to the order's merchandise total.
- *Freight Discount or Override:* A discount amount or percentage applied to the order's freight charges; or, a freight override amount; or free freight.
- *Additional Freight Discount:* A discount amount or percentage applied to the order's additional freight charges.
- *Tiered Discount or Free Gift:* A discount amount or percentage, or a free gift, of increasing value based on the total merchandise value of the order. For example, a tiered promotion might include an inexpensive free gift for an order of \$20.00 to \$29.99, a 5% discount for an order of \$30.00 to \$49.99, a 10% discount for an order of \$50.00 to \$99.99, and so on.

Ship Via Override: Although this is not a separate promotion type, you can also use a promotion code to assign a ship via override to an order. A ship via override can be set up as a separate promotion, or added to an order, freight, or additional freight discount promotion.

How does an order qualify? You can set up an order, freight, or additional freight promotion that will apply to every order you take; to do so, do not complete any of the qualifying fields for the promotion. The promotion can apply to the order as long as the current date falls within the date range specified for the promotion.

Use once?

For the other promotion types, or if you want to restrict an order, freight, or additional freight promotion to only certain orders, your selection criteria can include:

- source code (used on order header) or offer (associated with the source code used on the order header). You can also exclude source codes from a promotion by selecting the Exclude promotions field for the source code. Typically, you would exclude a source code from promotions when you have set up a promotion that specifies an offer, and you want to include most of the source codes associated with that offer except for a few.
- pay type (even if this pay type is not the only one on the order)
- merchandise total
- total item quantity (minimum or maximum)
- shipping location, such as restricting a freight or additional freight promotion to a range of SCF codes or to the continental U.S.A. (freight or additional freight promotions only)
- customer or customer price group
- order history (including first-time buyers who have never placed an order, or never received an order shipment)
- item categories
- ship via priority

 Important:

The system evaluates promotion qualifiers on an “all or nothing” basis; in other words, if you set up a promotion to qualify based on source code, pay type, *and* merchandise total, and an order does not match *all* of these qualifiers, none of the discounts or overrides of the promotion will apply to the order. To apply the promotion to any order matching *either* the source code, pay type, *or* merchandise total, set up a separate promotion for each.

See the [Cautions Related to Promotions](#).

Discount Promotions

BOGO (Buy One/Get One) Discount or Free Gift by Item Category or Item

BOGO promotions by item category or item apply a discount of up to 100% to an order line, apply a dollar discount or special price, or add a free item to the order. An order qualifies based on an item category's or item's ordered quantity.

Examples:

- Buy two of the same item, third one already on the order is 50% off
- Buy five within an item category, sixth one already on the order is free
- Buy any four SKU's of an item, get fifth SKU already on the order at \$1.00
- Buy five of the same item, get one free added to the order automatically

 Note:

Two different types of BOGO promotions: This discussion applies to BOGO promotions you set up when the [BOGO Grouping by Price Code or Category \(L62\)](#) system control value is set to *CATEGORY*. See [BOGO \(Buy One/Get One\) Discount or Free Gift by Price Code](#) for a discussion on BOGO promotions available when the [BOGO Grouping by Price Code or Category \(L62\)](#) system control value is set to *PRICE CODE*.

Discount applies to the lowest-priced item: If multiple order lines are eligible for the same entry in the BOGO promotion by item category or item, the lowest-priced eligible order line is discounted. For example, you set up a promotion for the toy item category: buy two, get one at 30% off. The customer orders two of item AB100 at \$10.00, one of item BC200 at \$12.00, and one of item CD300 at \$9.00. All these items are assigned to the specified item category. The discount applies to item CD300 at \$9.00.

Multiplying the BOGO discount: You can use the Allow mult flag so that the customer can multiply the BOGO discount: for example, buy five get one free; buy ten get two free; and so on.

BOGO promotions require an order line with the BOGO quantity: In order for a BOGO promotion by item category or item to apply to an order, there must be an order line that matches the BOGO quantity. For example, if you set up a BOGO promotion by item category or item as “buy two, get one at 50% off,” the order does not receive the 50% discount unless there is an eligible order line with a quantity of 1. The BOGO promotion does not apply to an order with a quantity of two.

! Important:

If you select the Allow multiples setting for any BOGO promotions by item category or item, then the order line quantity must be 1 for every order line on an order that might be eligible for the promotion; otherwise, the BOGO promotion might not apply correctly. To help ensure that the order line quantity is always 1, you can set both the [Default Order Quantity \(B30\)](#) and [Maximum Order Quantity \(C60\)](#) system control values to 1.

Setting up multiple entries for a BOGO promotion: You can set up multiple entries for a BOGO promotion by item category or item: for example, buy two from category A, get one at 30% off; buy two from category B, get 40% off. When an order is eligible for this type of BOGO promotion, the system determines how to apply the discount as follows:

- *Entries with the same qualifying quantity:* If an order line qualifies for multiple entries (at item category, base item, or SKU level) but with the same qualifying quantity, only one of the entries applies:
 - If it is a SKU'd item, the BOGO entry set up for the base item takes precedence. If there is no entry for the base item, the entry for the specific SKU takes precedence; otherwise, the item category entry applies.
 - If it is a non-SKU'd item, the BOGO entry set up for the item takes precedence; otherwise, the item category entry applies.
- *Entries with different qualifying quantities but same qualifier:* If an order line qualifies for multiple entries for the same level (item category, base item, or SKU) but with different qualifying quantities, the promotion applies all entries for which the order line qualifies. For example, you set up a promotion with entries to buy one, get one at 50% off and buy five, get one free. If the order includes a line with a quantity of five and a line with a quantity of one, both discounts apply: the line for one unit is discounted 50% and a free line is added.
- **Preventing additional discounting:** If you specify a [Price Override Reason for Promotions \(K45\)](#), the system applies this price override reason code to order lines discounted or added free through a BOGO promotion by item category. This price override reason code prevents the order line from being discounted by any other system-applied method, in order to prevent “double dipping.” However, you can still discount these lines through the application of a coupon (set up through [Working with Coupon Promotions \(WCPR\)](#)); also, discounted lines can still count as part of the qualifying quantity, even if the pricing method is BOGO and the [Price Override Reason for Promotions \(K45\)](#) is used, as described below.

Multiple discounts for the same BOGO promotion can still apply to the order: When you create a BOGO promotion by item category or item with multiple entries, it is important to test it to make sure it is applying discounts as intended. For example, if you set up a BOGO promotion that specifies a discount for an item category and also adds a free item for a specific item, and the item is assigned to the item category, the promotion might both apply the discount and add the free item. The [Price Override Reason for Promotions \(K45\)](#) is applied to the free order line; however, the order line with the quantity of five is still eligible for subsequent discounting.

Similarly, you can set up a BOGO promotion to buy five, get one at 50% off. The promotion discounts the line with the quantity of one. However, if the order is also eligible for an item category promotion, the qualifying order line with the quantity of five can also be discounted through the item category promotion.

Does not produce negative price: A BOGO promotion by item category or item will not result in a negative price, even if the Disc \$ specified is more than the unit price of the order line.

 Note:

A BOGO promotion by item category or item cannot include a ship via override.

To set up a BOGO promotion by item category or item, complete the following fields at the [Create Promotion Screen](#):

- *Required:*
 - Type = *BOGO*, and
 - Priority
- *Any of the following qualifying fields (leave blank to apply to all orders that include the item category(ies) or item(s)):*
 - Source code or Offer
 - Dollar amount
 - Customer(s)
 - Customer price group(s)
 - First time buyer
 - Pay type
 - Ship via priority
- *Other optional fields:*
 - Promotion ID
 - Item or item category exclusions

You also need to enter information at the *Work with BOGO Discount Screen (Item Category or Item)*.

BOGO Promotion by Item Category or Item Examples

Summary	Setup	Order Entry
Order three plush toys, get one at 50% off	<i>Work with BOGO Discount Screen (Item Category or Item):</i> Item category = PLH (plush toys) Req qty = 3 BOGO qty = 1 Free = NO Disc % = 50.00	Order includes order lines for four plush toys. The order line for the lowest-priced plush toy is discounted 50%.
Order two pens, get one for \$1.00	<i>Work with BOGO Discount Screen (Item Category or Item):</i> Item = PEN Req qty = 2 BOGO qty = 1 Free = NO Price = 1.00	Order includes a total of three order lines for SKU's of the PEN item. The lowest-priced order line is repriced to \$1.00.

Summary	Setup	Order Entry
Order five plush toys, get the sixth one free	<i>Work with BOGO Discount Screen (Item Category or Item):</i> Item category = PLH (plush toys) Req qty = 5 BOGO qty = 1 Free = YES Allow mult = unselected	Order includes an order line for five of one plush toy and one of another plush toy. The order line for the single plush toy is repriced to “no charge.”
For orders totalling \$50.00 or more, order three pencils, get one added to the order free; order six, get two added free; and so on	<i>Create Promotion Screen</i> Qualifying \$ amount = 50.00 <i>Work with BOGO Discount Screen (Item Category or Item):</i> Item = PENCIL) Req qty = 3 BOGO qty = 1 Free = Free Auto Add Allow mult = selected	Order includes six order lines for the item PENCIL. An order line for the item PENCIL with a quantity of two is added to the order at “no charge.”
Order two pens, get \$1.00 off two; also, order one sticker set, get 20% off another sticker set	<i>Work with BOGO Discount Screen (Item Category or Item) (for a single BOGO promotion or on separate BOGO promotions):</i> 1. Item category = UTN Req qty = 2 BOGO qty = 2 Free = NO Disc \$ = 1.00 2. Item category = STK Req qty = 1 BOGO qty = 1 Free = NO Disc % = 20.00	Order includes: • PEN123 BLUE 2@ 3.00 • PEN123 BLK 2 @ 3.00 • STK456: 1 @ 10.00 • STK789: 1 @ 10.00 After applying the BOGO discounts, the unit prices of the qualifying and BOGO lines are: • PEN123 BLUE 2@ 3.00 • PEN123 BLK 2 @ 2.00 (\$1.00 off each) • STK456: 1 @ 10.00 • STK789: 1 @ 8.00 (20% off)

Summary	Setup	Order Entry
Order five magnet sets, get one 50% off	<i>Work with BOGO Discount Screen (Item Category or Item):</i> Item category = MGN (magnets) Req qty = 5 BOGO qty = 1 Free = NO Disc % = 50.00	1. Order includes: • MGN123 5 @ 5.00 • MGN234 1 @ 4.50 After applying the BOGO discount, the unit price of MGN234 is 2.50 2. Order includes: 1. MGN123 10 @ 5.00 2. MGN234 2 @ 4.50 Order does not receive the BOGO discount, since the BOGO qty is 1 and there is no eligible order line with a quantity of one.

 Note:

For the second example order to qualify for the BOGO discount, item MGN234 should be entered as two separate orders

Summary	Setup	Order Entry
		er line s, eac h wit h a qua ntit y of one . Thi s is tru e reg ardl ess of the sett ing of the Allo w mul tipl es flag .

BOGO (Buy One/Get One) Discount or Free Gift by Price Code

BOGO promotions by price code apply a discount of up to 100% to one or more order lines, apply a dollar discount or special price, or add a free item to the order. An order qualifies based on a price code's ordered quantity, total merchandise value, or both.

Examples:

- Order at least two items assigned to the same price code, third one already on the order is free
- Order one item assigned to a price code, get another item from a different price code free
- Order an item priced at \$500 or more and assigned to a specific price code, get another item added to the order free

 Note:

Two different types of BOGO promotions: This discussion applies to BOGO promotions you set up when the *BOGO Grouping by Price Code or Category (L62)* system control value is set to *PRICE CODE*. See *BOGO (Buy One/Get One) Discount or Free Gift by Item Category or Item* for a discussion on BOGO promotions available when the *BOGO Grouping by Price Code or Category (L62)* system control value is set to *CATEGORY*.

Discount lowest-priced item(s): If multiple order lines are eligible for the same entry in the BOGO promotion by price code, the lowest-priced eligible order line is discounted. For example, you set up a promotion: buy two from men's fleece, get one from men's fleece at 30% off. The customer orders two of item AB100 at \$100.00, one of item BC200 at \$120.00, and one of item CD300 at \$90.00. All these items are assigned to the specified price code. The discount applies to item CD300.

Order line quantity must be 1: In order for a BOGO promotion by price code to apply to an order, the lines for the eligible items must be 1. To help ensure that the order line quantity is always 1, you can set both the *Maximum Order Quantity (C60)* system control values to 1.

Multiplying the BOGO discount: You can use the Allow mult flag so that the customer can multiply the BOGO discount: for example, buy five get one free; buy ten get two free; and so on.

Prorating the discount: Regardless of the type of discount, you can use the Prorate flag to prorate the discount across all of the items and order lines subject to the promotion. This option enables you to account for the proportional amount of the discount if you process a return against the discounted order. For example, you set up a BOGO promotion to buy \$500 in price code 22, get item EF123 (normally sold at \$100) added to the order free. If the Prorate flag is:

- unselected: item EF123 is added to the order at no charge, and the promotion does not change the prices of items assigned to price code 22.
- selected: the \$100 discount represented by adding EF123 at no charge is prorated across the order line for EF123 and the other order lines for items assigned to price code 22. If the item in price code 22 was \$1000, the promotion discounts it to \$909.09, and adds EF123 with a price of \$90.91.

Single discount for each promotion, but multiple promotions can apply to an order:

When you use BOGO promotions by price code, each BOGO promotion can specify just a single discount. It is not possible to set up multiple discounts for a single BOGO promotion by price code. However, different groups of lines on an order can qualify for different BOGO promotions (for example, buy \$500 in luggage and get a free travel bag, plus buy two sweaters and get one at 30% off).

Discount is always based on or applied to the lower-priced item(s): BOGO promotions by price code require that any discount calculation be based on the lower-priced items within the total BOGO quantity, and applied to the lower-priced items if the discount is not prorated, regardless of whether the lower-priced item is in the qualifying Price code or the BOGO PC. For example:

- If the promotion specifies “buy one, get one 30% off,” the 30% discount is calculated based on the lower-priced item.
- If the promotion specifies “buy one, get \$20 off one” and is not prorated, the \$20 discount applies to the lower-priced item.

If the total discount from the promotion exceeds the price of the lower-priced item(s), then the actual discount applied is limited to the price of the lower-priced item(s). For example, if the promotion specifies “buy one, get \$20 off one” and is prorated, but the lower-priced item is \$15, then the total prorated discount is \$15.

Preventing additional discounting: If you specify a , the system applies this price override reason code to order lines discounted or added free through a BOGO promotion by price code. This price override reason code prevents the order line from being discounted by any other system-applied method, in order to prevent “double dipping.” However, you can still discount these lines through the application of a coupon (set up through [Working with Coupon Promotions \(WCPR\)](#)); also, discounted lines can still count as part of the qualifying quantity, even if the pricing method is BOGO and the *Price Override Reason for Promotions (K45)* is used, as described below.

Does not produce negative price: A BOGO promotion by price code does not result in a negative price, even if the Disc \$ specified is more than the unit price of the order line.



Note:

A BOGO promotion by price code cannot include a ship via override.

To use BOGO promotions by price code without price code discounts: It is not necessary to use price code discounts in order to use BOGO promotions by price code. To group items by price code without applying discounts through the price code assignment:

- Set the *BOGO Grouping by Price Code or Category (L62)* system control value is set to *PRICE CODE*.
- *Price Override Reason for Promotions (K45)*
- Use [Working with Price Codes \(WPCD\)](#) to create one or more price codes to group items for BOGO promotions:
 - Specify a Start date and End date that are in the past.
 - Set the Qty required to a number higher than your highest possible order line quantity.
 - Specify a very small discount: for example, specify a Percent discount of .01.
- Use [Assigning Price Codes \(APCD\)](#) to assign items to price codes.
- Use the [Create Promotion Screen](#) and the *BOGO Discount by Item/Price Code Screen* to create each BOGO promotion by price code.

To set up a BOGO promotion by price code, complete the following fields at the *Create Promotion Screen*:

- *Required:*
 - Type = *BOGO*, and
 - Priority
- *Any of the following qualifying fields (leave blank to apply to all orders that include the price code(s) or item:*
 - Source code or Offer
 - Customer(s) OR Customer price group(s)
 - First time buyer
 - Pay type

- Maximum quantity
 - Ship via priority
- *Other optional fields:*
 - Promotion ID

You also need to enter information at the *Work with BOGO Discounts by Item/Price Code Screen*.

Important:

- The available options for configuring a BOGO promotion by price code are described in the table below. Using a different configuration option may produce unintended results when the promotion applies to an order.
- To use BOGO promotions by price code, you must create each order line with a quantity of one. Calculating discounts for a BOGO promotion by price code is not supported if the order line quantity is greater than one.

BOGO Promotion by Price Code Options and Samples

Summary	Setup	Order Entry
Order two items assigned to a price code, get one item assigned to the same price code free if the third item is already on the order. Prorate the discount across the three order lines.	<i>Work with BOGO Discounts by Item/Price Code Screen</i> Price code, BOGO price code = same price code Req qty = 2 BOGO qty = 1 Prorate = selected Allow multiples = unselected Free = Free	Order includes three items assigned to price code 11: - AB123 at \$100.00 - BC234 at \$90.00 - CD345 at \$80.00 - Total items for promotion: \$270.00 <i>Free item price is prorated:</i> When the promotion applies, the \$80 price of CD345 (the item with the lowest price) is prorated across the three items in the price code: - AB123 is now \$70.37 - BC234 is now \$63.33 - CD345 is now \$56.30 - Total items for promotion: \$190.00
	 Note: The equalizing price code must be	 Note: If the order includes more than three items assigned to the price code, the discount is prorated across the three lowest-priced qualifying items.
		<i>Discount calculation:</i> For each order line, the system calculates the discounted, prorated price by multiplying the item price by the discounted merchandise total, then dividing the result by the original merchandise total. For example, for AB123: $(100.00 * 190.00) / 270.00 = 70.37$.

Summary	Setup	Order Entry
		the same.
Order one item assigned to a price code, get a lower-priced item assigned to a different price code free if this item is already on the order; order two or more items assigned to a price code, get two lower-priced items assigned to a different price code free if the latter two items are already on the order; and so on. Do not prorate the discount.	<i>Work with BOGO Discounts by Item/Price Code Screen:</i> Price code = and BOGO price code = different price codes, with the BOGO price code specifying lower-priced items Req qty = 1 BOGO qty = 1 Prorate = unselected Allow multiples = selected Free = Free	Order includes: • EF456 (price code 11) at \$100.00 • GH567 (price code 22) at \$90.00 <i>Free item:</i> When the promotion applies, the price of GH567 changes to .00. <i>Multiple?</i> If the order also included: • IJ678 (price code 11) at \$95.00 • KL789 (price code 22) at \$80.00 Then the price of LK789 also changes to .00.

 Note:

The free item(s) must be the lower-priced item(s); so if the item assigned to price code 22 is priced higher than the item assigned to price code 11, then the item assigned to price code 11 is discounted to .00.

Summary	Setup	Order Entry
Order one item assigned to a price code, get an item assigned to the same price code at 30% off; order two items assigned to the price code, get two items assigned to the same price code at 30% off; and so on. Prorate the discount across the order lines.	<i>Work with BOGO Discounts by Item/Price Code Screen:</i> Price code and BOGO price code = the same price code Req qty = 1 BOGO qty = 1 Disc % = 30.00 Prorate = selected Allow mult = selected	Order includes the following items assigned to price code 11: • MN890: \$100.00 • OP901: \$90.00 • QR012: \$80.00 • ST123: \$70.00 • Total items for promotion: \$340.00 <i>Total discount:</i> When the promotion applies, the total discount is \$45.00, which is 30% \$150 (the total of the \$80 price of QR012 and the \$70.00 price of ST123, which are the items with the lowest prices. <i>Discounted prices:</i> The discount of \$45.00 is prorated across the four items in the price code: • MN890 is now \$86.76 • OP901 is now \$78.09 • QR012 is now \$69.41 • ST123 is now \$60.74 • Total items for promotion: \$295.00 <i>Prorated discount calculation:</i> For each order line, the system calculates the discounted, prorated price by multiplying the item price by the discounted merchandise total, then dividing the result by the original merchandise total. For example, MN890: $(100.00 * 295.00) / 340.00 = 86.76$.

 Note:

If there is a single additional item assigned to price code 11 (for example, 5 units rather than 4), its price is not included when prorating since it is not part of the total quantity

Summary	Setup	Order Entry

 for the promotion.

Summary	Setup	Order Entry
Order an item assigned to a price code and priced at \$498 or higher for one unit, get a specific item added to the order free, and prorate the price of the free item with the required item.	<i>Work with BOGO Discounts by Item/Price Code Screen:</i> Price code = specified Req amt = \$498.00 Req qty = 1 BOGO quantity, BOGO price code = not specified Prorate = selected Allow multiple = unselected Free = Free Auto Add Auto Item = specified	Order includes item UV234, assigned to price code 333, for \$1000. <i>Free item added:</i> When the promotion applies, it adds item XY345, normally \$100.00, to the order. <i>Prorated discount applied:</i> The related order lines are: • UV234 is now \$909.09 • XY345 is added at \$90.91 <i>Prorated discount calculation:</i> For each order line, the system calculates the discounted, prorated price by multiplying the item price by the discounted merchandise total, then dividing the result by the original merchandise total including the free item. For example, UV234: $(1000.00 * 1000.00) / 1100.00 = 909.09$.

 Note:

The price of a single unit of the qualifying item must be at least the required amount. For example, if the required amount is \$498.00 and the order includes two items for \$250 each assigned to the price code, the order does not qualify.

If not prorated? You can create a similar promotion with the Prorate flag unselected. In this case, the promotion does not discount the item from the required price code, and the free item is added at no charge.

Summary	Setup	Order Entry
		<i>If the free item is already on the order:</i> The promotion adds an additional unit of the free item if there is already a unit on the order. The unit already on the order is not discounted. <i>If multiple qualifying items:</i> If the order includes multiple qualifying items from the specified price code, the discount is prorated across all qualifying items.

Summary	Setup	Order Entry
Get 10% off any items assigned to a price code if their combined price is \$500 or higher, regardless of quantity on the order.	<i>Work with BOGO Discounts by Item/Price Code Screen:</i> Price code and BOGO price code = the same price code Req amt = \$500.00 BOGO qty = 99999 Disc % = 10.00 Prorate = unselected Allow multiples = unselected	Order includes items assigned to price code 44: • ZA456: \$100.00 • BC456: \$150.00 • DE567: \$300.00 • Total: \$550.00 • <i>Discount applied:</i> 1. ZA456 is now \$90.00 2. BC456 is now \$135.00 3. DE567 is now \$270.00

 **N**
o
t
e
:
Y
o
u
n
e
d
t
o
s
p
e
c
i
f
y
a
B
O
G
O
q
u
a
n
t
i
t
y
o
f
9
9
9
9
9
f
o
r
a
p
r
o
m
o
t
i
o

Summary	Setup	Order Entry
		n to re q ui re a ce rt ai n d ol la r a m o u nt b ut n ot sp ec if y a re q ui re d q u a nt it y.

Summary	Setup	Order Entry
Order one item in a price code, get \$20.00 off a lower-priced item in a different price code. Prorate the discount across the order lines.	<i>Work with BOGO Discounts by Item/Price Code Screen:</i> Price code = and BOGO price code = different price codes, with the BOGO price code specifying lower-priced items Req qty = 1 BOGO qty = 1 Disc \$ = \$20.00 Prorate = selected Allow multiples = unselected	Order includes: • EF456 (price code 11) at \$250.00 • GH567 (price code 22) at \$100.00 <i>Prorated discount applied:</i> The related order lines are: • EF456 is now \$235.71 • GH567 is now \$94.29 <i>Prorated discount calculation:</i> For each order line, the system calculates the discounted, prorated price by multiplying the item price by the discounted merchandise total, then dividing the result by the original merchandise total including the free item. For example, GH567: $(100.00 * 330.00) / 350.00 = 94.29$. <i>Discount cannot exceed price:</i> The total amount of the Disc \$ cannot exceed the price of either of the items; otherwise, the promotion discounts the items by the price of that item. For example, if the Disc \$ is \$20.00 and one of the items is \$10.00, the promotion applies a discount of \$10.00.

What if other repricing makes the order ineligible? It is possible for additional pricing options to make the items on an order ineligible for a promotion. For example:

- *price code:* A price code discount might make an order ineligible for a promotion that specifies a required merchandise amount. For example, a promotion specifies a BOGO qty of 1 and a Req amt of \$500.00. If the order includes an item priced at \$500.00 but discounted 15% through a price code, the order does not qualify for the promotion.
- *best price comparison:* When you use [Customer Price Group Best Price Comparison](#), if the calculated price for the Customer Price Group Code for CPG Pricing Only (L58) is lower than the price after applying the promotion, the order line uses the lower price.

Item Category Discount

You can set up item category promotions based on the merchandise total on the order or within the item category or categories, or on the quantity ordered within the item category(ies). You can specify a flat discount amount or a percentage to apply to items within the specified item category(ies), or a special price for items in the category(ies).

Example: Prorate a \$5.00 discount against items within an item category if you order \$30.00 or more within the category; or apply a 15% discount to items within a specific category when the order total is \$75.00 or higher.

Negative additional charge not an option: Unlike some of the other promotion types, an item category promotion cannot use an additional charge code to apply a discount as a negative additional charge on the order. The discount amount or percentage is applied directly to the order detail lines within the specified item category(ies).

**Note:**

An item category promotion cannot include a ship via override.

Applying to multiple item categories: You can set up an item category promotion to apply the same discount percentage, amount, or special price to multiple item categories. You can also specify whether to apply qualifiers such as total dollar value, minimum quantity, or maximum quantity based on the entire order or within an item category. See the examples, below, for more information.

Other discount rules: When an item category promotion applies a discount amount, it follows the same prorating logic and rules as an *Order Discount*, including the rules for sale items and non-discountable items. See the [Order Discount](#) discussion for more information.

To set up an item category promotion, complete the following fields at the [Create Promotion Screen](#):

- *Required:*
 - Type = *Item Category*, and
 - Priority
- *Any of the following qualifying fields (leave blank to apply to all orders that include the item category(ies)):*
 - Source code(s) or Offer
 - Pay type
 - Qualifying dollar amount
 - Qualifying dollar amount type
 - Qualifying quantity
 - Maximum quantity
 - Customer(s)
 - Customer price group(s)
 - First time buyer based on LTD Orders or LTD Sales
 - Ship via priority
- *Type of discount (one only):*
 - Item category special price
 - Discount percent
 - Discount amount
- *Other optional fields and options:*
 - Promotion ID
 - Item or item category exclusions

You also need to specify the eligible item category or categories at the [Work with Qualifying Item Categories Screen](#).

Item Category Promotion Examples

Summary	Setup	Order Entry
Order \$25.00 in stickers, get 15% off stickers	<i>Create Promotion Screen:</i> specify a Qualifying \$ amount of 25.00, a Qualifying type of Item Category, and a Discount percent of 15.00. <i>Work with Qualifying Item Categories Screen:</i> specify the stickers item category	Customer orders \$50.00 in stickers and \$10.00 in other merchandise. The 15% discount is applied to the sticker items on the order. The promotion does not discount any other merchandise on the order.

Summary	Setup	Order Entry
Order \$75.00 total merchandise, get \$5.00 off pencils and magnets	<i>Create Promotion Screen:</i> specify a Qualifying \$ amount of 75.00, a Qualifying type of Order, and a Discount amount of \$5.00. <i>Work with Qualifying Item Categories Screen:</i> specify the pencils and magnets item categories	Customer orders \$80.00 in total merchandise, including \$15.00 in pencils and magnets. The \$5.00 discount is applied against the order line(s) within each of the item categories (\$5.00 across each category). The promotion does not discount any other merchandise on the order.

 Note

:

If the Qualifying type was set to Item Category, then none of the items on the order would qualify for the promotion unless the total dollar value within the category was at least \$75.00.

Summary	Setup	Order Entry
Order five sticker sets or pencil sets, get 20% off.	<i>Create Promotion Screen:</i> specify a Qualifying qty of 5, a Qualifying type of Order, and a Discount percent of 20.00. <i>Work with Qualifying Item Categories Screen:</i> specify the item categories for the sticker sets and pencil sets	Customer orders three sticker sets, four pencil sets, and a magnet set. The 20% discount is applied against both the sticker sets and pencil sets because they are within the specified categories and the total unit quantity on the order is greater than five.
Order at least 5 stickers, magnets, or pencils, get \$2.00 off each category	<i>Create Promotion Screen:</i> specify a Qualifying qty of 5, a Qualifying type of Item category, and a Discount amount of 2.00. <i>Work with Qualifying Item Categories Screen:</i> specify the item categories for the sticker sets, magnet sets, and pencil sets	Customer orders six sticker sets, five magnet sets, and a pencil set. A \$2.00 discount is prorated across the sticker set lines, and a \$2.00 discount is also prorated across the magnet set lines. No discount applies to the pencils because this item category does not meet the qualifying quantity of five.
Get stickers or magnets at \$1.99 each (limit 5).	<i>Create Promotion Screen:</i> specify a Maximum qty of 5, a Qualifying type of Item category, and an Item category special price of 1.99. <i>Work with Qualifying Item Categories Screen:</i> specify the item categories for the sticker sets and magnet sets	Customer orders five sticker sets and six magnet sets. The sticker sets are repriced to \$1.99, but the magnet sets are not because the total quantity for the item category exceeds the maximum.

Can you combine item category promotions? You can offer more than one item category promotion at a time by setting up:

- a single item category promotion for two or more categories if all item categories should receive the same discounting. For example, you can offer 10% off stickers, magnets, and pencils.
- a separate item category promotion for each category, especially if each item category should receive a different type of discount: For example, you can offer 10% off stickers and \$5.00 magnets. Both promotions can apply to the same order if it qualifies.



Note:

The system does not apply two item category promotions to an order if they specify the same item category. See [Promotion Logic and Processing](#) for information on how the system selects a promotion to apply.

Preventing additional discounting: If you specify a *Price Override Reason for Promotions (K45)*, the system applies this price override reason code to order lines discounted through an item category promotion. This price override reason code prevents the order line from being discounted by any other system-applied method, in order to prevent “double dipping.” However, you can still discount these lines through the application of a coupon (set up through [Working with Coupon Promotions \(WCPR\)](#)).

**Note:**

It is possible to produce a negative merchandise total on an order by applying an item category promotion whose Discount amount exceeds the current merchandise total. To avoid this situation, specify a qualifying dollar amount.

Can you set up a buy one/get one promotion for an item category? You can also use item category as a qualifier for a BOGO promotion if the *BOGO Grouping by Price Code or Category (L62)* system control value is set to *CATEGORY*. See *BOGO (Buy One/Get One) Discount or Free Gift by Item Category or Item* for more information.

How do you assign items to item categories? Item category assignment is at the SKU level, and you specify an item category assignment at the [Create Item \(Base Information\) Screen](#) (non-SKU'd item) or the [Create SKU 1 of 2 \(With Overrides\) Screen](#) (SKU'd item). You can also assign an item category through [Using the SKU Generator \(ESKG\)](#).

Item category codes are defined in and validated against the Item Category table. See [Working with Item Category Codes \(WITG\)](#) for more information.

Order Discount

Order discount promotions apply to the merchandise on the order. You can specify either a flat discount amount or a percentage.

Example: Apply a \$5.00 discount to orders with source code AB1234 with merchandise totals of \$50.00 or more.

Prorate discounts? If you specify an additional charge code for the promotion, the discount will appear on the order as a credit additional charge; otherwise, the discount amount is prorated against the items on the order.

Example:

An order contains the following items, and a \$4.00 discount applies based on the promotion:

- AB100: 2 @ \$5.00 (\$10.00)
- BB200: 1 @ \$10.00
- CC300: 1 @ \$20.00

Merchandise total: \$40.00

If you specify an additional charge code, the discount appears as a \$4.00 negative additional charge on the order; the extended price of each line remains unchanged.

If you do not specify an additional charge code, the extended price of each order line is:

- \$10.00 - \$1.00 = \$9.00 (2 @ \$4.50)
- \$10.00 - \$1.00 = \$9.00
- \$10.00 = \$2.00 = \$18.00

Prorating discounts and sale items: The [Exclude Sale Item When Prorating Discounts \(I65\)](#) system control value affects the discounting only for an order-level percentage discount, or for a dollar discount if there is no additional charge code specified. See that system control value for more information and examples.

The [Sale item](#) flag for the Item Offer or the [Sale item](#) flag for the SKU Offer indicates whether an item is a sale item.

**Note:**

This system control value also controls whether the system includes sale items when determining if an order qualifies for a promotion based on quantity. If the system control value is *selected*, sale items are not included when the promotion is based on quantity; however, they are included when evaluating an order for a promotion based on dollar value.

Non-discountable items: Items that are flagged as non-discountable (based on the setting of the *Discountable* flag) are always excluded from prorating of discounts; also, they are not included in the merchandise total or the qualifying quantity when the system determines whether an order meets the *Qualifying \$ amount (Qualifying dollar amount)* required to apply a promotion.

Meeting a quantity requirement for an order discount: Items that are sold out or free of charge, or that are non-discountable as described above, are not included in the Qualifying quantity, if any, specified for an order discount promotion. Also, if the *Exclude Sale Item When Prorating Discounts (I65)* system control value is *selected*, items which are flagged as sale items for the Item Offer or SKU Offer are not included in the qualifying quantity.

To set up an order discount promotion, complete the following fields at the *Create Promotion Screen*:

- *Required:*
 - Type = *Order*, and
 - Priority
- *Any of the following qualifying fields (leave blank to apply to all orders that include the item category(ies)):*
 - Source code(s) or Offer
 - Pay type
 - Qualifying dollar amount
 - Qualifying dollar amount type
 - Qualifying quantity
 - Maximum quantity
 - Customer(s)
 - Customer price group(s)
 - First time buyer based on LTD Orders or LTD Sales
 - Ship via priority
- *Type of discount (one only):*
 - Item category special price
 - Discount percent
 - Discount amount
- *Other optional fields and options:*
 - Promotion ID
 - Additional charge code (leave blank to prorate the discount)

- Ship via override and related fields (see description below)
- Item or item category exclusions

**Note:**

An order cannot qualify for both an order promotion and a tiered promotion.

Order Discount Example

Discount description: The system subtracts 10% off the extended price of all items (Discount percent field) on any order whose header-level source code points to offer *SP8* (Qualifying offer field) if the merchandise total is \$50.00 or more (Qualifying dollar amount field). Additionally, if you assign this promotion code to the source code through [Working with Source Codes \(WSRC\)](#), the pop-up message (Pop-up message fields) will open in order entry after you enter the order header information.

The discount total will be added to the order as a negative additional charge because a code is specified in the Additional charge code field. If this field is blank, the discount would be subtracted from each order detail line extended price.

Tiered Discount or Free Gift

Tiered promotions are based on the merchandise total on the order. You can specify a flat discount amount or a percentage, or add a free gift, for each tier specified for the promotion.

Example: Apply a \$5.00 discount to orders with merchandise totals of \$50.00 or more; \$15 to orders with merchandise totals of \$100.00 or more; or add a free gift to orders with merchandise totals over \$150.00.

Tier logic: The system applies the discount or free gift specified for the highest tier that the order qualifies for based on total merchandise value. Discounts or free gifts specified for lower tiers do not apply.

Example: A promotion has two tiers: a 10% discount for merchandise values of \$75.00 or more, and a free gift for merchandise values over \$100.00. If an order has a total merchandise value of \$95.00, the 10% discount is applied. If an order has a total merchandise value of \$120.00, the free gift is added but the 10% discount is not applied.

**Note:**

A tiered promotion cannot include a ship via override.

Other discount rules: When a tiered promotion applies a discount, it follows the same prorating logic and rules as an *Order Discount*, including the rules for sale items and non-discountable items. See the *Order Discount* discussion for more information.

To set up a tiered promotion, complete the following fields at the *Create Promotion Screen*:

- *Required:*
 - Type = *Tiered Discount*, and
 - Priority
- *Any of the following qualifying fields (leave blank to apply to all orders that include the item category(ies)):*

- Source code(s) or Offer
- Pay type
- Customer(s)
- Customer price group(s)
- First time buyer based on LTD Orders or LTD Sales
- Ship via priority
- *Other optional fields and options:*
 - Promotion ID
 - Additional charge code (leave blank to prorate the discount)
 - Item or item category exclusions

You also need to enter information on the tiers at the *Work with Promotion Discounts Screen*.

**Note:**

An order cannot qualify for both an order promotion and a tiered promotion.

Tiered Promotion Example

Promotion description: The promotion includes the following tiers:

- free gift of a pen for orders whose total merchandise value is from \$10.00 to \$49.99
- 10% discount for orders whose total merchandise value is from \$50.00 to \$99.00, prorated against the order detail lines
- 15% discount for orders whose total merchandise value is \$100.00 or more, prorated against the order detail lines

The promotion applies to source code *SOURCE8* (Qualifying source field). Additionally, if you assign this promotion code to the source code through *Working with Source Codes (WSRC)*, the pop-up message (Pop-up message fields) will display in order entry after you enter the order header information.

Because no additional charge code is specified, the discount percentage will be subtracted from each order detail line, with the exception of sale items and non-discountable items. If an additional charge code is specified, the entire discount amount would be added to the order as a negative additional charge.

Freight Discount or Override

A freight discount applies to the freight charges on an order.

You can set up the following types of freight discounts:

1. Discount amount or discount percentage applied to freight total:

Example: \$5.00 off shipping if you order by the end of June; or, 50% off shipping charges if your order totals \$50.00 or more.

**Note:**

The discount will appear on the order as a credit additional charge.

2. *Freight override amount to replace freight total:*

Example: Order by November 15 and pay only \$3.00 in freight, regardless of order total.

3. *Free freight:*

Example: Free shipping for our valued customers.

You can also set up a ship via override independently of, or in addition to, a freight discount. See the description below for more information.

Meeting a quantity requirement for a freight discount or override: Items that are sold out, free of charge, drop ship, or have a ship via item charge are not included in the Qualifying quantity, if any, specified for a freight discount promotion. Also, if the [Exclude Sale Item When Prorating Discounts \(I65\)](#) system control value is *selected*, items which are flagged as sale items for the Item Offer or SKU Offer are not included in the qualifying quantity.

Additional freight: If an order qualifies for a freight promotion, the system updates the freight charges on the order; however, any additional freight that has been assigned to the order will remain on the order. For example, if the order qualifies for a free freight promotion and the ship via on the order has an additional freight charge, the system removes the freight charges from the order, but keeps the additional freight charge. You can create an additional freight discount promotion to discount the additional freight on an order; see *Additional Freight Discount*.

To set up a freight discount, complete the following fields at the *Create Promotion Screen*:

- *Required:*
 - Type = *Freight*, and
 - Priority
- *Any of the following qualifying fields (leave blank to apply to all orders that include the item category(ies)):*
 - Source code(s) or Offer
 - Pay type
 - Qualifying dollar amount
 - Qualifying dollar amount type
 - Qualifying quantity
 - Maximum quantity
 - Customer(s)
 - Customer price group(s)
 - First time buyer based on LTD Orders or LTD Sales
 - Ship via priority
- *Other optional fields and options:*
 - Promotion ID
 - Additional charge code

- Continental USA Only
- Ship via override and related fields (see description below)

Freight Discount Example

Discount description: The system changes the freight amount charged on an order to \$3.50 if the header-level source code is *SUMMER*. An additional charge code is not used in this case, because the freight amount is simply overridden.

Additional Freight Discount

An additional freight discount applies to the additional freight charges on an order. You might use this type of discount for ship vias set up as *Add'l freight only*, or to offer express shipping at a reduced cost.

Example: Overnight shipping for the same price as ground shipping, this catalog only.

You can also set up a ship via override independently of, or in addition to, an additional freight discount:

Example: Free upgrade to Federal Express.

Meeting a quantity requirement for a freight discount or override: Items that are sold out, free of charge, drop ship, or have a ship via item charge are not included in the Qualifying quantity, if any, specified for a freight discount promotion. Also, if the *Exclude Sale Item When Prorating Discounts (I65)* system control value is *selected*, items which are flagged as sale items for the Item Offer or SKU Offer are not included in the qualifying quantity.

To set up an additional freight discount, complete the following fields at the *Create Promotion Screen*:

- *Required:*
 - Type = *Additional Freight*
 - Priority
- *Type of additional freight discount (one only):*
 - Discount amount (requires additional charge code)
 - Discount percent (requires additional charge code)
- *Any of the following qualifying fields (leave blank to apply to all orders):*
 - Source code(s) or Offer
 - Pay type
 - Qualifying dollar amount
 - Qualifying quantity
 - Maximum quantity
 - Customer(s)
 - Customer price group(s)
 - First time buyer based on LTD Orders or LTD Sales
 - Ship via priority
- *Other optional fields:*
 - Promotion ID
 - Continental USA only

- Ship via override and related fields (see description below)

Additional Freight Discount Example

 Note:

This example also includes a ship via override, described in the following pages. You can set up a ship via override as part of a freight or additional freight discount, or you can set it up independently.

Discount description: The system adds a negative additional charge of \$7.50 (as a discount against the additional freight amount) *and* overrides the ship via on the order to ship via number 4 for any order that:

- has an additional freight charge, and
- uses pay type 7 (Qualifying pay type), and
- is shipping to the continental USA only (Continental USA only).

Ship Via Override

You can set up an order, freight, or additional freight promotion type to also include a ship via override. Alternatively, you can set up a freight or additional freight promotion type to provide a ship via override only, with no additional discounting.

 Note:

You cannot include a ship via override in a tiered, item category, or BOGO discount promotion.

The system applies this ship via override to the order unless another ship via override takes precedence; see [Ship Via Override Hierarchy](#) for a list of ways the system can override the shipper specified on the order with another shipper and the hierarchy in which the ship via overrides take precedence.

Example: Free upgrade to Federal Express.

See the [Cautions Related to Promotions](#) for more information on how to set up a promotion that constitutes or includes a ship via override.

To set up a ship via override, complete the following fields:

- *Required:*
 - Type (*Order*, *Freight*, or *Additional Freight* to set up in combination with a discount; enter *Freight* or *Additional Freight* to set up as a separate promotion)
 - Priority
 - Ship via override
- *Ship via override qualifying fields (leave blank to apply to all orders):*
 - Country of shipping address
 - From and To SCFs for shipping address
- *Additional optional qualifying fields:*

- Source code(s) or Offer
- Pay type
- Qualifying dollar amount
- Qualifying quantity
- Maximum quantity
- Qualifying customer or customer price group
- First time buyer based on LTD Orders or LTD Sales
- Ship via priority
- Promotion ID
- Continental USA only (valid for freight or additional freight promotions only)

Promotion Logic and Processing

Your options in setting up promotions and the logic that the system uses in applying promotions to orders are described below.

- [When Promotions can be Either Manually-Assigned or System-Assigned](#)
- [When Promotions Must be Assigned by the System](#)
- [Promotion Hierarchy: Best Way](#)
- [Promotion Hierarchy: Regular Priority](#)
- [Using the Order Total to Evaluate Different Promotion Types](#)
- [Additional Notes about Promotion Selection Hierarchy](#)
- [Order Transaction History Message](#)
- [System Control Values Related to Promotions](#)
- [Cautions Related to Promotions](#)

When Promotions can be Either Manually-Assigned or System-Assigned

If the [Allow Manual Entry of Promotion Code \(I63\)](#) system control value is selected and the promotion's [Required entry](#) flag is selected, then the system does not automatically assign the promotion to an order. Instead, you need to use the [Enter Promotion Code Screen](#) to assign the promotion.

Applying the promotion in interactive order entry: The [Enter Promotion Code Screen](#) opens automatically when you select *Reprice* at the [Work with Order Lines Screen \(Adding Items to the Order\)](#) or select *Accept* or *Exit* at the [Coupon Discount Window](#) if the [Prorate Dollar Discounts and Coupons \(D90\)](#) system control value is selected. See [Repricing Screen Flow](#).

At the Enter Promotion Code screen, you can specify one or more promotions to apply to the order. You can prompt on the Promotion code field to advance to the Select Promotion window. The setting of the [Search Promotions by Start Date in Order Entry \(M27\)](#) system control value defines how promotions sort on the Select Promotion window:

- If selected, the Select Promotion window sorts promotions in ascending start date sequence.
- If unselected, the Select Promotion window sorts promotions in ascending promotion code sequence.

The system confirms that the order qualifies for each promotion you select based on the basic qualifiers (those set up at the [Create Promotion Screen](#)) at the time you enter it.

! Important:

In order for you to advance to the [Enter Promotion Code Screen](#) during interactive order entry, or for promotions to apply to orders automatically, the price method for the source code on the order must be set to *Reg Plus Reprice*.

The system also applies promotions that are not flagged for required entry if the order qualifies. See *Promotion Hierarchy: Best Way* and *Promotion Hierarchy: Regular Priority* for information on how the system determines which promotion(s) to apply to an order.

At final acceptance of the order, the system re-evaluates the order for qualifying promotions, including both those manually entered and those assigned by the system. At this time, discounts on order lines, negative additional charges, free gifts, and freight or additional freight overrides might be removed or added to the order to reflect the promotions that ultimately apply to the order.

Applying promotions to web orders: To apply a promotion flagged for required entry to an order processed through the *Generic Order Interface (Order API)*, specify the promotion in the promotion attribute or through the Promotions element. To apply multiple promotions, you need to use the Promotions element.

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

Order maintenance: You cannot apply a promotion to an order in order maintenance.

When Promotions Must be Assigned by the System

Combining promotions: If the [Allow Manual Entry of Promotion Code \(I63\)](#) system control value is *unselected*, the *Enter Promotion Code Screen* does not open in order entry, and you cannot specify promotion codes through the order API. Instead, the system selects the promotion(s) to apply to an order. Only promotions whose [Required entry](#) flag is *unselected* are eligible for selection. See *Promotion Hierarchy: Best Way* and *Promotion Hierarchy: Regular Priority* for information on how the system determines which promotion(s) to apply to an order.

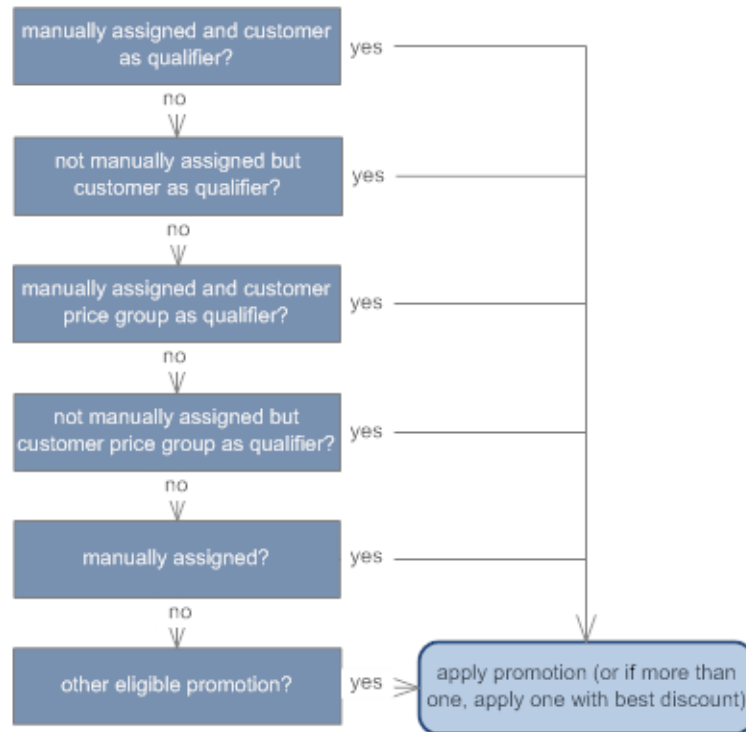
Promotion Hierarchy: Best Way

Best way promotion hierarchy: The [Best Way Promotions \(K44\)](#) system control value indicates whether to try to apply the promotion of each type (with the exception of BOGO promotions; see *Best Way Promotion Hierarchy for BOGO Promotions* specifically called out for the order or customer, or that provides the highest discount. With this system control value selected, the system uses three basic criteria:

- **Manual entry?** Manually-entered promotions (entered at the [Enter Promotion Code Screen](#) or passed in the inbound order message) are preferred over system-assigned promotions (applied automatically because the order is eligible and the [Required entry](#) flag is *unselected*). However, if the [Allow Manual Entry of Promotion Code \(I63\)](#) system control value is *unselected*, it is not possible to manually enter a promotion code.
- **Customer or customer price group assignment?** When you specify a customer price group for a promotion, the system prefers this promotion to those without a customer price group assignment. However, when you specify a particular customer number for a promotion, this gives the promotion higher priority than promotions with just a customer price group promotion.

- **Best savings?** If a promotion is not differentiated through manual entry, customer assignment, or customer price group assignment, the system selects the promotion of each type that provides the highest total discount dollar value. In the case of a freight promotion, a ship via override is determined to be the best value.

As a result, the system selects among eligible promotions using the hierarchy illustrated below:



If the *Allow Manual Entry of Promotion Code (I63)* system control value is unselected, manual entry of a promotion is not possible, so the hierarchy is simpler:

- **Customer qualifier?** Is the customer specified at the [Work with Qualifying Customer/Price Groups Screen](#)?
- **Customer price group qualifier?** Is the customer assigned to a customer price group specified at the *Work with Qualifying Customer/Price Groups Screen*?
- **Best savings?** If the customer does not qualify based on customer number or price group, or if the system must select among more than one promotion with the same qualifier, it selects the promotion of each type that provides the highest total discount dollar value.

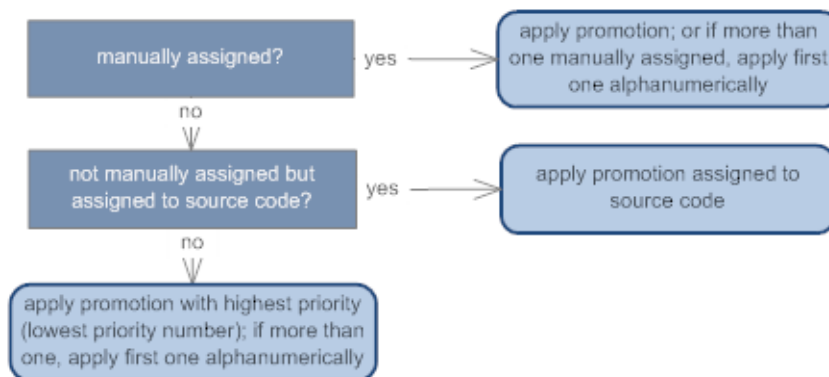
Examples of best discount calculation:

- Tiered promotion TA offers 10% off an order with a total merchandise value of \$100.00, for a total discount of \$10.00. Tiered promotion TB offers a free item; the item's regular price is \$15.00. Promotion TB provides the best discount (\$15.00 is more than \$10.00).
- Item category promotion IA offers 15% off a minimum order of \$25.00. Item category promotion IB offers a special item category price of \$1.99. The order includes 12 units of qualifying items at \$2.50 each for a total merchandise value of \$30.00 in the category. Promotion IB (\$1.99 * 12, or \$23.88, for a total savings of \$6.12) offers a better discount than promotion IA (15% of \$30.00, or \$4.50).

Best Way Promotion Hierarchy for BOGO Promotions

When the *Best Way Promotions (K44)* system control value is selected, BOGO promotions do not use the same hierarchy as other promotion types; instead, they use a simpler hierarchy:

- **Manually assigned?** Manually-entered BOGO promotions (entered at the [Enter Promotion Code Screen](#) or passed in the inbound order message) are given higher priority than system-assigned promotions (applied automatically because the order is eligible and the [Required entry](#) flag is unselected). However, if the *Allow Manual Entry of Promotion Code (I63)* system control value is unselected, it is not possible to manually enter a promotion code.
- **Assigned to source code:** If there is a BOGO promotion specified for the source code and no other BOGO promotion was manually entered, the promotion from the source code applies. (The promotion must be manually entered or passed in the order API, or have the *Required entry* flag unselected, as described above.)
- **Priority:** If no BOGO promotions are manually applied or assigned to the source code, the system checks for BOGO promotions that are not flagged for *Required entry*. If there is more than one, the BOGO promotion with the highest priority (lowest priority number) applies. If the eligible BOGO promotions have the same priority number, the system applies the first one alphanumerically.



Promotion Hierarchy: Regular Priority

When the *Best Way Promotions (K44)* system control value is unselected, the system does not check whether the promotion is assigned to a particular customer number or customer type, or whether it offers the best discount. Instead, it uses two different possible hierarchies, depending on the setting of the *Allow Manual Entry of Promotion Code (I63)* system control value:

If the *Allow Manual Entry of Promotion Code (I63)* system control value is selected:

#	Step
1.	<i>Promotion assigned to source code:</i> Is there a promotion of this type assigned to the source code on the order header? If the order qualifies for the promotion you have defined in the Source Code table, this promotion applies to the order. Also, if the promotion is flagged for Required entry, it must be entered on the order or passed in the order API; otherwise...
2.	<i>Manually entered:</i> If there is no promotion assigned to the source code, look first to promotions that are manually entered at the <i>Enter Promotion Code Screen</i> or passed in the order API. If more than one promotion of the same type is manually entered or passed in the order API, select the promotion based on the: • lowest priority number (highest priority); if more than one, • latest start date; if more than one, • first one alphanumerically.

#	Step
3.	<i>System-assigned:</i> If there is no promotion of the type manually entered or passed in the order API, look for eligible promotions that are not flagged for Required entry. If there is more than one, select the promotion based on the: • lowest priority number; if more than one, • latest start date; if more than one, • first one alphanumerically.

If the Allow Manual Entry of Promotion Code (I63) system control value is unselected:

Example #	Description
1.	<i>Promotion assigned to source code:</i> Is there a promotion of this type assigned to the source code on the order header? If the order qualifies for the promotion you have defined in the Source Code table (and not flagged for Required entry), this promotion applies to the order. Otherwise...
2.	<i>System-assigned:</i> If there is no promotion of the type assigned to the source code, look for eligible promotions that are not flagged for Required entry. If there is more than one, select the promotion based on the: • lowest priority number; if more than one, • latest start date; if more than one, • first one alphanumerically.

Using the Order Total to Evaluate Different Promotion Types

Determining the merchandise total when evaluating for promotions: In evaluating an order to see if it qualifies for a promotion based on merchandise total, provided you do not use [Customer Price Group Best Price Comparison](#), the system:

- Applies any BOGO promotion(s) and reduces the merchandise total based on the BOGO promotions if appropriate; next,
- Applies any item category promotion(s) based on the newly-calculated merchandise total after subtracting any BOGO promotion discounts; then,
- Applies any additional promotions based on the merchandise total after applying the BOGO and item category promotions, but ignoring the effects of any other promotion types. For example, if the order qualifies for a freight promotion based on merchandise total, and also qualifies for an order promotion that discounts the merchandise total, the freight promotion applies based on the total before applying the order promotion.

Example:

BOGO promotion: Buy five pencil sets, get one 50% off

Item category promotion: Buy \$50.00 in item category UTN, get \$10.00 off

Order promotion: 20% off \$50.00 order total

Freight promotion: free shipping on orders over \$80.00

Order includes six pencil sets, each on a separate order line for \$10.00 each, plus four sticker sets at \$10.00 each = \$100.00 merchandise total. The pencil sets are in item category UTN, but the sticker sets are not.

1. BOGO promotion: Reduces one of the pencil sets by 50%, to \$5.00. New merchandise total: \$95.00.

2. Item category promotion: Prorates \$10.00 discount across five remaining pencil sets currently priced at \$10.00, reducing them to \$8.00 each; the line discounted through the BOGO promotion is not eligible for further discounting. The sticker sets are not discounted. New merchandise total: \$85.00.

3. Order promotion: Applies 20% discount to the four sticker sets, reducing them to \$8.00 each. New merchandise total: \$77.00 (nine lines at \$8.00 plus one line at \$5.00).

4. Freight promotion: Changes freight charges to zero. Order still meets qualifying dollar total of \$80.00 based on merchandise total before applying order promotion.

Applying order or tiered promotions after BOGO or item category promotions: If you use the *Price Override Reason for Promotions (K45)* system control value to prevent further discounting when you apply a BOGO or item category promotion, these order lines are not eligible for discounting through an order or tiered promotion. However, if you set up an order or tiered promotion to apply a discount through a negative additional charge code, this negative additional charge can still apply to the order.

Example: An item category promotion has discounted the items on an order and applied the *Price Override Reason for Promotions (K45)* to prevent further discounting. If there is also an order promotion offering a 10% discount without an additional charge code, the order lines that have been discounted through the item category promotion are not discounted any further. However, if the order promotion specifies an additional charge code, a negative additional charge for 10% of the merchandise total applies to the order.

Additional Notes about Promotion Selection Hierarchy

When selection takes place in order entry: An order's qualification for a promotion may change at any time during order entry. For example, an order's qualification for a promotion based on merchandise total may change as you add or delete items from the order, change quantities, select a different ship via, or apply a payment method.

Pop-up message: A promotion's pop-up message opens when you first enter the order's header information if the promotion is assigned in the Source Code table. However, this promotion may not actually apply to the order once you have completed entry if, for example, the promotion is qualified based on pay type and this pay type is not used on the order, or if another promotion of that type has a higher priority.

Manual entry of a promotion: Even when you enter a promotion at the *Enter Promotion Code Screen*, the promotion still might not apply to the order if, for example, the order does not meet the required merchandise amount for the promotion. In this situation, the screen does not necessarily display an error message indicating that the order does not qualify.

Order maintenance: The system does not evaluate the order for promotions in order maintenance or make any changes.

Applying Promotions through the Order API

Specifying one or more promotions: If the *Allow Manual Entry of Promotion Code (I63)* system control value is *selected*, you can pass one or more promotions that are flagged for *Required entry* and apply them to the order through the *Inbound Order XML Message (CWORDERIN)*. The *Promotion* attribute enables you to pass a single promotion, and the *Promotion* element enables you to pass a single promotion or multiple promotions. If the system control value is *unselected*, the order API ignores any promotions passed in the inbound order message.

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

Promotion validation: If the order does not qualify for any of the promotions passed in the inbound order message and the *Allow Manual Entry of Promotion Code (I63)* system control value is *selected*, the order API does not apply the unqualified promotions; instead, it writes an [Order Transaction History Message](#) indicating that the promotion was not applied. The order does not go into error status. However, if a promotion code passed in the inbound order message is invalid, the order does go into error status.

Promotions logic: The order API uses the same logic as regular order entry to determine if an order qualifies for a promotion, and to select a promotion if the order qualifies for more than one of each type. See *Promotion Logic and Processing* for an overview.

Promotion discounts indicated in response message: If you receive the *Detailed Order XML Response (CWORDEROUT)* from the initial message (based on a *response_type* of *D* or *E*), the response message indicates the effects of any promotions applied to the order. Certain promotions are listed by name in the *Promotion* element, while others are indicated purely through the discounts or free gifts applied; see *Discounted and Added Items in the CWorderOut Response Message* for more information.

**Note:**

The *Promotion* element is included in the CWORDEROUT response message only if the outbound XML version is 3.0 or higher (available in release 2.0 or later of Order Management System, or Order Administration).

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

Promotions applied automatically: If promotions apply automatically because the *Required entry* flag is *unselected*, these promotions are indicated in the CWORDEROUT response message in the same way as promotions passed in the inbound order message.

Order Transaction History Message

You can review the promotions that apply to an order in standard order inquiry by selecting *Order History* to advance to the [Display Order History Screen](#). The same information is available in streamlined order inquiry by selecting *History*.

This screen includes an *UPSELL PROMO* entry for each promotion that applies to the order, including the dollar amount, if any (**Note:** Discounts added as additional charges are listed as negative amounts, while prorated discounts are listed as positive amounts). The screen also includes an entry for any merchandise discount that is prorated.

Order promotions are included in the total listed as *Total Prorated Order Level Discount*. This total also includes any dollar discount by source or offer or manually-entered discount amount.

You can also review the additional charge codes used to apply promotion discounts, if any, by selecting *Charges* in standard order inquiry.

**Note:**

There may be a rounding discrepancy on the total discount applied to an order when you prorate against the order lines if the amounts do not divide evenly. This discrepancy should be no more than a few pennies. The likelihood of the rounding discrepancy occurring increases if there are multiple discounts that apply to an order, such as a promotion percentage discount and a dollar discount by source.

System Control Values Related to Promotions

As part of your setup for using promotions, complete the following system control values:

- *Allow Manual Entry of Promotion Code (I63)*: Controls the ability to manually specify promotions to apply to an order.
- *Exclude Sale Item When Prorating Discounts (I65)*: Determines whether to apply promotion discounts to sale items.
- *Best Way Promotions (K44)*: Controls the logic the system uses to select the promotions to apply to an order.
- *Price Override Reason for Promotions (K45)*: Specifies the price override reason code that prevents an item discounted through an Item Category or BOGO promotion from being discounted by any subsequent promotions that apply to the order.
- *BOGO Grouping by Price Code or Category (L62)*: Specifies whether to use BOGO promotions by item category or by price code.
- *Search Promotions by Start Date in Order Entry (M27)*: Defines how promotions sort on the Select Promotion window in interactive Order Entry.

See the description of each system control value and the discussion under *Promotion Logic and Processing* for more information.

Cautions Related to Promotions

The following cautions provide more detail on how promotions apply to orders:

- *Cautions for All Promotions*
- *Caution for Order and Tiered Promotions*
- *Cautions for Freight Promotions and Ship Via Overrides*
- *Cautions for One-Time-Use Promotions*
- *Cautions for BOGO Promotions by Item Category or Item*
- *Cautions for BOGO Promotions by Price Code*
- *Cautions for Item Category Promotions*

Cautions for All Promotions

- **Promotions as order credits:** It is possible for some promotions to result in a net credit against an order if you set the promotion up as a discount amount. For example, if you set up a freight discount as a \$5.00 credit, and the freight on the order is only \$3.95, the promotion will represent free freight plus a \$1.05 credit on the order.
- **Must qualify based on all criteria:** Whether you set up a promotion to offer a single type of discount or override, or to offer a discount and override in combination, it is important to remember that the order must qualify for *all* criteria, in which case the order receives *all* of

the promotion benefits. If the order fails to qualify for *any* of the promotion qualifiers, the order receives *none* of the promotion benefits.

- **Required price method:** In order for promotions to apply to an order, the Price method for the source code on the order header must be set to *Reg Plus Reprice*.
- **When promotions are applied:** If the [Allow Manual Entry of Promotion Code \(I63\)](#) system control value is:
 - *unselected*: the system evaluates the order for during repricing, the initial order accept, and the final order accept.
 - *selected*: the system evaluates the order for promotions during repricing when you complete the *Enter Promotion Code Screen* and again at order acceptance.
- **Setting the Max qty too low:** It is possible to set a maximum quantity that is less than the Qualifying quantity, or less than the Req qty for a BOGO promotion; however, in this situation, an order can never be eligible for the promotion discount.
- **Cannot override price matrix customer specials:** Any order line that is repriced with the [Price Override Reason for Price Matrix Customer Specials \(K42\)](#) is not eligible for a promotion discount.
- **Tax calculation:** If a promotion is prorated against the merchandise total, the tax amount is calculated based on the discounted merchandise price; otherwise, the tax amount is calculated based on the original item price because the discount appears as a negative additional charge.

Example:

If prorating: original item price = \$10.00

price after applying discount = \$9.00

tax = \$.45 (5% of \$9.00)

If not prorating: original item price = \$10.00

discount appears as \$1.00 negative additional charge; item price remains \$10.00

tax = \$.50 (5% of \$10.00)

- **Pricing sequence:** Discounts are applied to the order line price after all other price methods, *except* for a coupon percentage discount or a dollar discount by source code or offer. Also, unlike some other repricing options, repricing through an order promotion does not display a message on the screen and it is not described on the [Work with Order Line Screen \(Changing/Adding an Item\)](#).
- **Sale items excluded?** The *Exclude Sale Item When Prorating Discounts (I65)* system control value controls whether to include sale items when prorating discounts. This system control value affects the discounting only for a percentage discount, or for a dollar discount if there is no additional charge code specified. See that system control value for more information and examples. The [Sale item](#) flag for the Item Offer or the *Sale item* flag for the SKU Offer indicates whether an item is a sale item.
- **Non-discountable items excluded from prorating and qualifying dollar total:** Items that are flagged as non-discountable (based on the setting of the [Discountable](#) flag) are always excluded from prorating of discounts and from the qualifying dollar total.
- **Items excluded from qualifying quantity:** The system does not include items in the qualifying quantity if they are:
 - added to the order in sold out status

- added to the order at “no charge” (However, items added with a discount, such as through promotional pricing or by source, are still included)
- flagged as a *Sale item* flag for the Item Offer or the *Sale item* flag for the SKU Offer, if the *Exclude Sale Item When Prorating Discounts (I65)* system control value is *selected*
- flagged as non-discountable (based on the setting of the *Discountable* flag)
- drop ship (freight and additional freight promotions only)
- identified as heavy items by on a ship via/item charge assignment through the [Work with Ship Via/Item Screen](#) (freight and additional freight promotions only)
- **No re-evaluation in order maintenance:** The system does not evaluate whether the order still qualifies for the promotion if you make any changes in order maintenance. For example, if the order total decreases due to a cancellation and no longer meets the requirement for the promotion, the promotion is not automatically removed.

Caution for Order and Tiered Promotions

The following additional caution applies to order and tiered promotions that apply a discount to the order:

- **Manual price overrides:** The system applies order discounts, regardless of whether they are prorated, even to items whose price you have overridden in order entry, with the exception of order lines using the [Price Override Reason for Promotions \(K45\)](#).
- **Price override reason required for free items:** The system applies the [Price Override Code for Promotional Priced Lines \(B61\)](#) when it adds a free item through a tiered promotion. If this system control value is blank, the system does not add the free item to the order.
- **Best price comparison:** When you use [Customer Price Group Best Price Comparison](#), if the calculated price for the Customer Price Group Code for CPG Pricing Only (L58) is lower than the price after applying any promotions, the order line uses the lower price.

Cautions for Freight Promotions and Ship Via Overrides

The following additional cautions apply to freight promotions and other promotion types that apply a ship via override:

- **Freight overrides:** An order is not eligible for a freight promotion if:
 - you set the Calculate freight field on the order header to *unselected*, or
 - you enter an override amount in the Freight override (current ship to) field on the [Work with Order Ship to Properties Screen \(Properties\)](#).
- The customer is eligible for free freight through a loyalty program. See [Loyalty Memberships](#) for background.
- **Valid SCF/Ship Via required:** In order for the ship via override to apply to an order, the override ship via must already be set up with the SCF on the order shipping address as a valid SCF/ship via combination. If the SCF/ship via is not valid combination, the ship via override does not apply to the order; additionally, if the ship via override is set up as part of a discount promotion (such as a freight discount promotion), the discount does not apply to the order either.

You use [Working with SCF/Ship Via Values \(WSHV\)](#) to set up SCF/ship via combinations.

- **PO Boxes:** If the override ship via does not accept a PO box as a valid delivery address, the ship via override does not take place on an order with a PO box; additionally, if the ship via override is set up as part of a discount promotion (such as a freight discount promotion), the discount does not apply to the order either.

- **If more than one qualifying promotion has a ship via override:** If more than one promotion type that applies to the order includes a ship via override, the system uses the override of the *last* promotion in the following order:
 - *Additional Freight*
 - *Freight*
 - *Order*
- **Ship via override:** The system applies the promotion's ship via override to the order unless another ship via override takes precedence; see [Ship Via Override Hierarchy](#) for a list of ways the system can override the shipper specified on the order with another shipper and the hierarchy for ship via overrides.

Cautions for One-Time-Use Promotions

Any type of promotion can be flagged for one-time use. Things to note:

- If the promotion's *Use once* flag is selected:
- If the [Allow Manual Entry of Promotion Code \(I63\)](#) system control value is *selected*: You can apply the promotion more than once only if you have authority under the [Override One Time Use Promotion \(J08\)](#) secured feature.
- The ability to override the one-time-use option is available only in interactive order entry; the order API never applies a one-time-use promotion a second time for a customer.
- If the [Allow Manual Entry of Promotion Code \(I63\)](#) system control value is *unselected*, the system never applies the same one-time-use promotion twice for a customer, even if the promotion is passed in the CWOOrderIn message. If the promotion is passed and has already been applied to a prior order, the system writes an Order Transaction History message such as `Promotion 1TFRT not applied`.

About the Customer Sold To Promo table: The system uses this table to track the orders on which customers used promotions flagged for one-time use. You can review these promotions for a customer at the [Display One Time Use Promotions Screen](#) in customer maintenance.

- The Customer Sold To Promo record is not deleted when the order where the promotion was used is canceled, or the item(s) on the order sold out. It is possible to apply the promotion to an additional order only if the [Allow Manual Entry of Promotion Code \(I63\)](#) system control value is *selected* and you have authority under the [Override One Time Use Promotion \(J08\)](#) secured feature.
- The Customer Sold To Promo record is initially created when you complete creation of a suspended order; however, the promotion is not applied, and the Customer Sold To Promo record is not created, when the order is in error.
- The Customer Sold To Promo record is not retained if:
 - an order initially received through the order API is not ultimately accepted.
 - the order no longer qualifies for the one-time-use promotion at acceptance, so the promotion is removed.
 - you delete a suspended order from a batch or delete the batch.
- Purging orders deletes the related Customer Sold To Promo records. See [Purging Orders \(MPOR\)](#).
- Performing a customer merge/purge merges the Customer Sold To Promo records. See [Working with Merge/Purge Sold-to Names \(MMCS\)](#).

Cautions for BOGO Promotions by Item Category or Item

The following additional cautions apply to BOGO promotions by item category or item (if the *BOGO Grouping by Price Code or Category (L62)* system control value is set to *ITEM CATEGORY*):

- **Sale or non-discountable items:** The BOGO repricing does not apply to an order line for a Sale item or an item flagged as Non-discountable.
- **BOGO item quantity and item/SKU or quantity must match:** A BOGO promotion set up to discount an existing line on the order does not apply if there is no order line with the correct quantity and item, SKU, or item category. For example, you set up a BOGO promotion as: buy five in an item category, get one at 50% off. An order includes three lines, each for two units within the item category. Because there is no eligible order line with a quantity of one, the BOGO promotion does not apply.
- **Confirming that the order qualifies for the promotion:** The *Enter Promotion Code Screen* does not display an error message when you enter a BOGO promotion if the order does not currently qualify for the promotion based on the criteria set up at the *Work with BOGO Discount Screen (Item Category or Item)*; however, if the order does not qualify when you accept the order, the promotion discount is not applied.

! Important:

If you select the Allow multiples setting for any BOGO promotions, then the order line quantity should be 1 for every order line on an order that might be eligible for the promotion; otherwise, the BOGO promotion might not apply correctly. To help ensure that the order line quantity is always 1, you can set both the *Default Order Quantity (B30)* and *Maximum Order Quantity (C60)* system control values to 1.

Cautions for BOGO Promotions by Price Code

The following additional cautions apply to BOGO promotions by price code (if the *BOGO Grouping by Price Code or Category (L62)* system control value is set to *PRICE CODE*):

- **Sale or non-discountable items:** The BOGO repricing does not apply to an order line for a Sale item or an item flagged as Non-discountable.
- **Order line quantity must be 1:** If the order line quantity is greater than 1, the promotion might not apply correctly. To help ensure that the order line quantity is always 1, you can set both the *Default Order Quantity (B30)* and *Maximum Order Quantity (C60)* system control values to 1.
- **Only specific promotion variations are supported:** See *BOGO (Buy One/Get One) Discount or Free Gift by Price Code* for a listing of the specific options that are supported for BOGO promotions by price code.
- **BOGO quantity must meet the required amount:** If the promotion specifies a Req amt, then the Req qty of qualifying items on the order must meet or exceed the Req amt within that quantity. For example, if the promotion specifies a Req amt of \$500 and a Req qty of 1, and an order includes 2 qualifying items for \$250 each, the order is not eligible for the promotion; it would need to include a single qualifying item for \$500 or more to be eligible.
- **Discount is always based on or applied to the lower-priced item(s):** BOGO promotions by price code require that any discount calculation be based on the lower-priced items within the total BOGO quantity, and applied to the lower-priced items if the discount is not prorated, regardless of whether the lower-priced item is in the qualifying Price code or the BOGO PC. For example:
 - If the promotion specifies “buy one, get one 30% off,” the 30% discount is calculated based on the lower-priced item.

- If the promotion specifies “buy one, get \$20 off one” and is not prorated, the \$20 discount applies to the lower-priced item.

If the total discount from the promotion exceeds the price of the lower-priced item(s), then the actual discount applied is limited to the price of the lower-priced item(s). For example, if the promotion specifies “buy one, get \$20 off one” and is prorated, but the lower-priced item is \$15, then the total prorated discount is \$15.

Cautions for Item Category Promotions

The following additional caution applies to item category promotions:

- **Confirming that the order qualifies for the promotion:** The *Enter Promotion Code Screen* does not display an error message when you enter an item promotion and the order does not currently qualify for the promotion based on the item categories specified at the [Work with Qualifying Item Categories Screen](#); however, if the order does not qualify when you accept the order, the promotion discount is not applied.

Work with Promotions Screen

Purpose: Use this screen to review and work with promotions. See [Working with Promotions \(WPRO\)](#) for an overview of how promotions work, examples of each type, and setup instructions.

Additional screens: You can advance to the following screens from the Work with Promotions screen:

- [Create Promotion Screen](#)
- [Work with Qualifying Source Codes Screen](#)
- [Work with Promotion Discounts Screen](#)
- [Copy Promotion Screen](#)
- [Work with Qualifying Customer/Price Groups Screen](#)
- [Work with Qualifying Item Categories Screen](#)
- [Work with BOGO Discount Screen \(Item Category or Item\)](#)
 - [Change BOGO Discount Screen](#)
- [Work with BOGO Discounts by Item/Price Code Screen](#)
 - [BOGO Discount by Item/Price Code Screen](#)
 - [BOGO Discount by Item/Price Code Screen \(Display Mode\)](#)
- [Work with Item/Category Exclusions Screen](#)
- [Work with Promotions by Start Date Screen](#)
- [Work with Promotions by End Date Screen](#)

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



Note:

The system retains the last view you used in Work with Promotions; instead of advancing to the Work with Promotions screen, you may advance to the *Work with Promotions by Start Date Screen* or *Work with Promotions by End Date Screen*.

Promotions display on the Work with Promotions screen in ascending promotion code sequence; see *Work with Promotions by Start Date Screen* to display promotions in ascending start date sequence and see *Work with Promotions by End Date Screen* to display promotions in ascending end date sequence.

Field	Description
Promotion	A code to identify the promotion. Enter a full or partial promotion code to display promotions in ascending promotion code sequence, starting with your entry. Alphanumeric, 7 positions; optional.
Description	The description of the promotion. Enter a full or partial description to display promotions that contain your entry. Alphanumeric, 30 positions; optional.
Start Date	The date when the promotion first becomes effective. Enter a start date to display promotions whose start date is equal to or later than the date you entered. Note: This sort is available <i>Work with Promotions by Start Date Screen</i> only on the. Numeric, 6 positions (in user date format); display-only.
End Date	The last date when the promotion is effective. Enter an end date to display promotions whose end date is equal to or later than the date you entered. Note: This sort is available only on the <i>Work with Promotions by End Date Screen</i> . Numeric, 6 positions (in user date format); display-only.
Type	The type of promotion. Valid values are: • <i>Additional freight</i> • <i>BOGO</i> • <i>Freight</i> • <i>Item Category</i> • <i>Order</i> • <i>Tiered discount</i> • '' = messaging or reporting promotion Select a promotion type to display promotions assigned to that type. Optional.
Excl	Indicates whether you have specified item or item category exclusions for the promotion. <i>N</i> = There are currently no item or item category exclusions. <i>Y</i> = There is at least one item or item category exclusion. See Work with Item/Category Exclusions Screen for more information.

Screen Options	Procedure
Create a promotion	Select <i>Create</i> to advance to the Create Promotion Screen .
Change a promotion	Select <i>Change</i> for a promotion to advance to the Change Promotion screen. For field descriptions, see <i>Create Promotion Screen</i> . You can change all of the information except the Promotion code field.
Copy an existing promotion	Select <i>Copy</i> for a promotion to advance to the Copy Promotion Screen .

Screen Options	Procedure
Delete a promotion	Select <i>Delete</i> for a promotion to delete it. You can also run the PURGEPR periodic function to delete completed promotions whose end date is equal to or earlier than a calculated purge date.
Display a promotion	Select <i>Display</i> for a promotion to advance to the Display Promotion screen. You cannot change any fields on this screen. For field descriptions, see the <i>Create Promotion Screen</i> .
Work with item/category exclusions	Select <i>Item/Item Category Exclusions</i> to advance to the Work with Item/Category Exclusions Screen .
View promotions in ascending start date sequence	Select <i>By Start Date</i> to advance to the Work with Promotions by Start Date Screen .
 Note: This option is available only on the Work with Promotions by End Date Screen and <i>Work with Promotions Screen</i>.	
View promotions in ascending end date sequence	Select <i>By End Date</i> to advance to the <i>Work with Promotions by End Date Screen</i> .
 Note: This option is available only on the <i>Work with Promotions by Start Date Screen</i> and <i>Work with Promotions Screen</i>.	
View promotions in ascending promotion code sequence	Select <i>By Promotion</i> to advance to the <i>Work with Promotions Screen</i> .
 Note: This option is available only on the <i>Work with Promotions by Start Date Screen</i> and <i>Work with Promotions by End Date Screen</i>.	
Create or delete promotions based on the information in the Promotion Upload table.	Select <i>Upload</i> to submit the program that creates or deletes promotions based on the information in the Promotion Upload table. See Promotion Upload for more information.

Create Promotion Screen

Purpose: To create a new promotion, Select *Create* at the *Work with Promotions Screen*.

Field	Description
Promotion code	A code used to group source codes together for reporting analysis, to display a pop-up message in order entry, to provide a merchandise, freight, or additional freight override, apply a negative additional charge, add a free or discounted item, or to override the ship via on an order. Numeric, 7 positions. Create screen: required. Change screen: display-only.
Required entry	Indicates whether you must enter this promotion at the Enter Promotion Code Screen in interactive order entry or include it in the inbound order message for the order API in order to have the promotion apply to the order. • <i>Selected</i> = If the Allow Manual Entry of Promotion Code (I63) system control value is: • <i>selected</i> = the system does not evaluate the order to see if it qualifies for the promotion unless you enter the promotion code at the Enter Promotion Code Screen in interactive order entry or include it in the inbound order message for the order API • <i>unselected</i> = this promotion cannot apply to any orders • <i>Unselected</i> = The system evaluates the order to see if it qualifies for the promotion See Promotion Logic and Processing for more information on how the system determines whether to apply a promotion to an order.
Use once	Indicates whether the promotion can apply to more than one order for a customer. • <i>Selected</i> = The promotion can apply just once for a customer; however, if the Allow Manual Entry of Promotion Code (I63) system control value is <i>selected</i> and you have authority to the Override One Time Use Promotion (J08) secured feature, you can apply the promotion to an additional order for the customer in order entry. • <i>Unselected</i> = There is no restriction on how many times the promotion can apply for a customer. See Cautions for One-Time-Use Promotions.
Description	The description of the promotion code. Alphanumeric, 30 positions; required.
Start date	The date when the promotion becomes effective. This date might be used in the promotion selection hierarchy; see Promotion Logic and Processing for more information. Numeric 6 positions (in user date format), required.
End date	The last date when the promotion is effective. Numeric 6 positions (in user date format), required.
Pop up window messages 1-4	Up to four messages that appear in a pop-up window in order entry if this promotion is assigned to the source code on the order header. Alphanumeric, 4 lines, 30 positions each line; optional.

Field	Description
	Non-Messaging Promotion Values:  Note: Complete the following fields only for promotions that apply some sort of a discount, free gift, or ship via override. See About Discount Promotions and Promotion Logic and Processing for more information on setting up and using discount promotions.
Type	The type of discount to apply to orders that qualify for this promotion. Valid values are: • <i>Additional freight</i> • <i>Freight</i> • Item Category • <i>Order</i> • <i>Tiered discount</i> • BOGO • '' = messaging or reporting promotion  Note: You cannot change this setting once you have created the promotion.
Priority	Required if you define any order promotion values. The priority in which the system evaluates whether this promotion applies to an order. Lower numbers indicate higher priorities; that is, promotions with the lowest priority numbers are evaluated first. Depending on your setup, the system might not use the priority as a criterion to compare promotions; see <i>Promotion Logic and Processing</i> for more information. Numeric, 3 positions; required if you enter a discount Type.
Promotion ID	A code used to identify or group promotion codes for reporting and analysis. Alphanumeric, 5 positions; optional.

Field	Description
Qualifying source	Optionally, enter a source code that must be used on the order header for an order to qualify for the promotion. If you enter a qualifying source code here, you advance automatically to the Work with Qualifying Source Codes Screen, where you have the option of entering additional qualifying source codes for the promotion. If you complete more than one qualifying field, the order must meet all criteria to qualify for the promotion. You can qualify a promotion by source code(s) or offer, but not both. See <i>About Discount Promotions</i> and <i>Promotion Logic and Processing</i>.  Note: Qualifying a promotion by source code differs from assigning the promotion to the source code to force a pop-up message to open or give the promotion highest priority in order entry. An error message indicates if you enter a source code that has the Exclude promotion field <i>selected</i>: Source code flagged to exclude promotions. Source codes are defined in and validated against the Source table. See Working with Source Codes (WSRC). You can qualify a promotion by source code <i>or</i> offer, but not both. See <i>About Discount Promotions</i> and <i>Promotion Logic and Processing</i>. <i>More than one qualifying source?</i> If you have specified more than one qualifying source code for the promotion, the first qualifying source code alphanumerically is displayed in this field at the Change Promotion and Display Promotion screens and is display-only. If you flagged a source code to exclude promotions after assigning it as a qualifying source and it is the first qualifying source for the promotion alphanumerically, you will not be able to edit the promotion. The work around is to: • change the setting of the Exclude promotion flag for the source code • remove the source code as a qualifying source for the promotion • reset the Exclude promotion flag for the source code Alphanumeric, 7 positions; optional or display-only.
Qualifying offer	Optionally, enter the offer that must be associated with the source code used on the order header for an order to qualify for the promotion. If you complete more than one qualifying field, the order must meet all criteria to qualify for the promotion. Offer codes are defined in and validated against the Offer table. See Working with Offers (WOFR). You can qualify a promotion by source code <i>or</i> offer, but not both. See <i>About Discount Promotions</i> and <i>Promotion Logic and Processing</i>. Alphanumeric, 3 positions; optional.

Field	Description
Qualifying pay type	Optionally, enter the pay type that must be used on an order for the order to qualify for the promotion. There can be other pay types used on the order as well. If you complete more than one qualifying field, the order must meet all criteria to qualify for the promotion. Pay type codes are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY). When you use a pay type as a qualifier, you typically do not see the effect of the promotion until you accept the order. See <i>About Discount Promotions</i> and <i>Promotion Logic and Processing</i>. Numeric, 2 positions; optional.
Qualifying \$ amount (Qualifying dollar amount)	Optionally, enter the total merchandise dollar amount an order must have to qualify for the promotion. The system evaluates the qualifying dollar amount after other repricing, such as price tables or an order-level discount percentage, is applied to the merchandise total. <i>Exclusions:</i> Non-discountable items are not included in the qualifying merchandise dollar total. If you complete more than one qualifying field, the order must meet all criteria to qualify for the promotion. <i>Item category promotions:</i> For an item category promotion, you can specify whether to evaluate an order based on the entire merchandise total on the order, or only the merchandise total within that specific category. See the Qualifying \$ amount type, below. See <i>About Discount Promotions</i> and <i>Promotion Logic and Processing</i>. Not a valid entry for a tiered promotion or a BOGO promotion by price code. See the <i>Work with Promotion Discounts Screen</i> for information on specifying qualifying dollar amounts for tiered promotions, and see the <i>BOGO Discount by Item/Price Code Screen</i> for more information on setting up BOGO promotions by price code. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Qualifying \$ amount type	For an item category promotion, use this field to indicate whether the system uses the entire merchandise order total or quantity to determine whether the order qualifies for the promotion, or only the merchandise total or quantity within a specific item category. Valid values are: • <i>Item Categ</i> = Only order lines for items assigned to a qualifying item category are included in determining the qualifying dollar amount, qualifying quantity, or maximum quantity. If the promotion specifies multiple item categories, each item category is evaluated independently. <i>Example:</i> The promotion offers a 10% discount for a Qualifying \$ amount of \$50.00 and two item categories, IT1 and IT2. There must be at least \$50.00 worth of merchandise in IT1 for these order lines to receive the 10% discount; similarly, there must be at least \$50.00 worth of merchandise in IT2 for these order lines to receive the discount. • <i>Order</i> = All order lines (except for non-discountable items) are eligible to be included in the qualifying dollar amount, qualifying quantity, or maximum quantity, regardless of item category assignment. <i>Example:</i> The promotion offers an Item category special price for Qualifying quantity of 5 and a Maximum quantity of 10 for item categories IT1 and IT2. The order includes 7 order lines, including 5 for IT1 and 2 for IT2. Each of the order lines receives the special price.

 Note:

When evaluating an order for an item category promotion that specifies a qualifying quantity or maximum quantity, the system treats a blank Qualifying \$ amount type as if it is set to *Order*.

Required for an Item category promotion if you specify a Qualifying \$ amount.

Field	Description
Qualifying quantity	Optionally, enter the total unit quantity required for an order to qualify for the promotion. <i>Example:</i> If the qualifying quantity is five, an order can qualify with: • a single order line with a quantity of five • five order lines, each for a quantity of one • any other combination of order lines with a total unit quantity of 5 or more <i>Exclusions:</i> The system does not include items in the qualifying quantity if they are: • added to the order in sold out status • added to the order at “no charge” (However, items added with a discount, such as through promotional pricing or by source, are still included) • flagged as a Sale item flag for the Item Offer or the <i>Sale item</i> flag for the SKU Offer, if the Exclude Sale Item When Prorating Discounts (165) system control value is <i>selected</i> • flagged as non-discountable (based on the setting of the Discountable flag) • drop ship (freight and additional freight promotions only) • identified as heavy items by on a ship via/item charge assignment through the Work with Ship Via/Item Screen (freight and additional freight promotions only) • You cannot specify a qualifying quantity for a tiered or a BOGO promotion. • The system does not prevent you from entering a qualifying quantity that is greater than the maximum quantity, below. Item category promotions: When you specify a qualifying quantity for an item category promotion, the system uses the Qualifying \$ amount type to determine whether to include the total quantity of all items on the order to evaluate whether each item category qualifies for the promotion, or evaluates the quantity of each item category separately. For example, if the qualifying quantity is 5, the Qualifying \$ amount type is set to <i>Item Category</i>, and the order includes 3 of IT1 and 6 of IT2, only IT2 qualifies for the promotion. If the Qualifying \$ amount type is blank, then the system uses the quantity of all items on the order to determine whether each item category qualifies for the promotion. Numeric, 5 positions; optional.

Field	Description
Max qty	Optionally, enter the maximum number of units an order can have in order to qualify for the promotion. You might use this field to restrict orders from a promotion if they are already receiving a deep discount through a quantity break price or other pricing option. If the order exceeds the maximum quantity, none of the items on the order are eligible for the promotion. <i>Which items on the order are included in evaluation?</i> This total follows the same rules as those described for the Qualifying quantity, except that “no charge” items are included in the total when evaluating the order for the Max qty. <i>How does the maximum work for item category promotions?</i> If you set up an Item category promotion that also specifies a Qualifying \$ amount (Qualifying dollar amount) with the Qualifying \$ amount type set to Item Category, the evaluation for maximum quantity is against the item category rather than the whole order; however, the evaluation takes place at final order acceptance, and not at the Enter Promotion Code Screen.

 Note:

The screen does not prevent you from entering a maximum quantity that is less than the Qualifying quantity, or less than the Req qty for a BOGO promotion; however, in this situation, an order can never be eligible for the promotion discount.

Item category promotions: When you specify a maximum quantity for an item category promotion, the system uses the Qualifying \$ amount type to determine whether to include the total quantity of all items on the order to evaluate whether each item category qualifies for the promotion, or evaluates the quantity of each item category separately. For example, if the maximum quantity is 10, the Qualifying \$ amount type is set to *Item Category*, and the order includes 12 of IT1 and 7 of IT2, only IT2 qualifies for the promotion.

If the Qualifying \$ amount type is blank, then the system uses the quantity of all items on the order to determine whether each item category qualifies for the promotion.

Numeric, 5 positions; optional.

Field	Description
	 Note: At this screen you can enter either a single qualifying customer number or customer group, but not both. To enter additional customer numbers or groups, use the Work with Qualifying Customer/Price Groups Screen. If you have previously entered any qualifying customer numbers or groups, the first customer number or group (but not both) is listed here; use the Work with Qualifying Customer/Price Groups Screen to review any additional customer numbers or groups.
Qualifying customer#	Optionally, use this field to restrict the promotion to one or more specific customers. If you enter a customer number in this field or a customer price group in the next field, you advance to the Work with Qualifying Customer/Price Groups Screen. At this subsequent screen, you can specify any number of individual customers or customer price groups. Customer numbers are defined in and validated against the Customer table. See Creating and Updating Sold-to Customers (WCST) for more information. If you have previously specified a qualifying customer and you specified this qualifier before specifying any customer price groups, this first customer is listed in this field and is display-only; otherwise, this field is blank. Numeric, 9 positions; optional.
Qualifying customer group	Optionally, use this field to restrict the promotion to one or more specific customer price groups. If you enter a customer price group in this field or a customer number in the previous field, you advance to the Work with Qualifying Customer/Price Groups Screen. At this subsequent screen, you can specify any number of individual customers or customer price groups. Customer price groups are defined in and validated against the Customer Price Group table. See Working with Customer Price Groups (WCPG) for more information. If you have previously specified a qualifying customer price group, and you specified this qualifier before specifying any individual customer numbers, this first customer price group is listed in this field and is display-only; otherwise, this field is blank. Alphanumeric, 4 positions; optional.

Field	Description
First time buyer	Optionally, use this field to restrict the promotion to first-time customers. Valid values are: • <i>LTD orders</i>: The promotion is available only if the customer placing the order has not placed any previous orders. A customer who has placed an order is not eligible, even if the order is subsequently canceled or if all items on the order are sold out; however, the customer is eligible if the previous order is still in suspended or error status, or if it consisted of a return processed as a new order with a negative quantity. • <i>LTD sales</i>: The promotion is available only if the customer placing the order has not previously had an order shipment. A customer whose only previous orders have not yet been shipped, or if they consisted of a return processed as a new order with a negative quantity, is still eligible for the promotion. This qualifier applies to the customer placing the order only (customer sold-to); it does not apply to order recipients.
Continental USA only	Optionally, use this field to restrict a freight or additional freight promotion discount, or ship via override, to states in the continental U.S.A. Valid values are: • <i>selected</i> = Promotion applies only when the shipping address is in the continental U.S.A. • <i>unselected</i> = Promotion is not restricted to the continental U.S.A.
	 Note: This option is available only for freight or additional freight promotions.
Qualifying via priority	Optionally, enter the priority that must be assigned to the ship via on the order header for the order to qualify for the promotion. The ship via priority is a one-position number that controls how the system allocates inventory to backorders or reserves inventory during Batch Reservation. <i>Example:</i> You can create a promotion to offer \$.99 ground shipping for orders over \$25.00, and use this field to specify the ship via priority for these ship vias. If the ship via changes for any reason before you accept the order and the current ship via's priority does not match this setting, the system removes the promotion from the order. See Working with Ship Via Codes (WVIA) for more information on setting up ship vias, and see Ship Via Override Hierarchy for a discussion on how the ship via on an order might be overridden in order entry. Numeric, 1 position; optional.

Field	Description
Item category special price	Indicates the price to apply for items within an item category specified at the <i>Work with Qualifying Item Categories Screen</i> for this promotion. <i>Example:</i> Enter 4.99 have the promotion discount all items within the item category to \$4.99, regardless of their regular price. You can enter an Item category special price only for Item Category promotions; in this case, you do not enter a Discount amount or a Discount percent.

 Note:

If there is an item on the order whose price is lower than the special price, the promotion does not change the price. For example, the special price is \$4.99 and item AB100 is priced at \$4.00: the promotion does not reprice the item.

	Numeric, 13 positions with a 2-place decimal; optional.
Additional charge code	Optionally, enter an additional charge code to use when adding a non-prorated discount to an order. You should specify an additional charge code when: • an order, tiered, or freight type discount should not be prorated • a freight discount uses a discount amount or percentage (<i>not</i> a freight override amount or free freight) • any additional freight discount applies to an order; all additional freight discounts use either a discount amount or percentage In these situations, the discount is added to the order as a negative additional charge using the code you specify here.

 Note:

If you use an additional charge code to apply a discount against an order, this negative additional charge code reduces the total the customer pays even if you have used the [Price Override Reason for Promotions \(K45\)](#) to prevent additional discounting against the prices of the order lines.

You cannot specify an additional charge code for an Item Category or BOGO promotion.

Additional charge codes are defined in and validated against the Additional Charge table; see [Establishing Additional Charge Codes \(WADC\)](#).

Alphanumeric, 2 positions; may be optional or required, depending on other field settings.

Field	Description
Discount amount	The dollar discount amount to apply to the order: • <i>Order discount</i>: This amount is prorated against the dollar value of order lines if you do not enter an additional charge code; otherwise, the discount is added to the order as a negative additional charge. • <i>Item category</i>: This amount is prorated against the order lines in that item category (or categories). See Prorating Logic for more information on the prorating calculation. • <i>Freight or additional freight discount</i>: This amount is added to the order as a negative additional charge. Not a valid entry for a tiered or BOGO promotion. See the <i>Work with Promotion Discounts Screen</i> for information on specifying discount amounts for tiered promotions, and see the <i>Work with BOGO Discount Screen (Item Category or Item)</i> for information on specifying discount amounts for BOGO promotions. <i>Include sale item?</i> The specified discount applies to sale items if the Exclude Sale Item When Prorating Discounts (I65) is <i>unselected</i>. See that system control value for more information. Numeric, 13 positions with a 2-place decimal; optional.
Discount percent	The percentage discount to apply to the items on the order. • <i>Order discount</i>: This percentage is applied to each order line's unit price if you do not enter an additional charge code; otherwise, the total merchandise discount is added to the order as a negative additional charge. • <i>Item category</i>: This percentage is applied to the unit price of each order line for the item category(ies). • <i>Freight or additional freight discount</i>: This percentage of the freight or additional freight charge is added to the order as a negative additional charge. <i>Include sale item?</i> The specified discount applies to sale items if the Exclude Sale Item When Prorating Discounts (I65) is <i>unselected</i>. See that system control value for more information. Not a valid entry for a tiered or BOGO promotion. See the <i>Work with Promotion Discounts Screen</i> for information on specifying discount amounts for tiered promotions, and see the <i>Work with BOGO Discount Screen (Item Category or Item)</i> for information on specifying discount amounts for BOGO promotions. Numeric, 5 positions with a 2-place decimal; optional.
Freight override amount	The freight amount to charge on the order, overriding the freight charge based on the calculation methods that would normally apply. You use this field only for a freight discount. You cannot enter an additional charge code if you enter a freight override amount. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Free freight	Indicates whether to provide freight free of charge. You use this field only for a freight discount. Valid values are: <i>selected</i> = This is a free freight discount promotion <i>unselected</i> = This is not a free freight discount promotion You cannot enter an additional charge code if you enter <i>Y</i> in this field. Note: If the customer is eligible for free freight through a loyalty program, you cannot apply a promotion that includes free freight. See Loyalty Memberships for background.
Ship via override	Use this field to have the promotion replace the ship via on the order with the ship via you enter here. You can combine a ship via with an order, freight, or additional freight discount promotion, or set it up as the only discount/override for a freight or additional freight discount promotion. See Ship Via Override for information on how to set up a ship via override, and for some of the cautions to observe. The system applies the promotion ship via override to the order unless another ship via override takes precedence; see Ship Via Override Hierarchy for a list of ways the system can override the shipper specified on the order with another shipper and the hierarchy in which the ship via overrides take precedence. Ship via codes are defined in and validated against the Ship Via table. See Working with Ship Via Codes (WVIA). Not a valid entry for a BOGO, item category, or tiered promotion. Item Ship Via Override Item ship via overrides define the shippers that are eligible to ship an item to its destination. If the ship via override defined for the promotion is not a valid shipper for one or more of the items on the order, the system will <i>not</i> apply the ship via override from the promotion to the order. See Working with Item Ship Via Overrides. Numeric, 2 positions; optional.
Ship via country	The country eligible to receive the ship via override. Only orders you are shipping to this country will receive the ship via override, or any additional discounts included in the promotion. You use this field only for a ship via override. Country codes are defined in and validated against the Country table; see Setting Up the Country Table (WCTY). Not a valid entry for a BOGO, item category, or tiered promotion. Alphanumeric, 3 positions; optional.

Field	Description
From SCF	The first (lowest) SCF eligible to receive the ship via override. Only orders you are shipping to zip codes that fall within this SCF up to the To SCF will receive the ship via override, or any additional discounts included in the promotion. You use this field only for a ship via override. Not a valid entry for a BOGO, item category, or tiered promotion. SCF codes are defined in and validated against the SCF table; see Working with SCF Codes (WSCF). The system also requires that: • a SCF/ship via record exists for the <i>Ship via override</i>; see Working with SCF/Ship Via Values (WSHV) for background. • the SCF is valid for the <i>Ship via country</i>, if specified; otherwise, for the <i>Default Country for Customer Address (B17)</i>. Alphanumeric, 3 positions; optional.
To SCF	The last (highest) SCF eligible to receive the ship via override. Only orders you are shipping to zip codes that fall within the From SCF to this SCF will receive the ship via override, or any additional discounts included in the promotion. You use this field only for a ship via override. Not a valid entry for a BOGO, item category, or tiered promotion. SCF codes are defined in and validated against the SCF table; see Working with SCF Codes (WSCF). The system also requires that: • a SCF/ship via record exists for the <i>Ship via override</i>; see Working with SCF/Ship Via Values (WSHV) for background. • the SCF is valid for the <i>Ship via country</i>, if specified; otherwise, for the <i>Default Country for Customer Address (B17)</i>. Alphanumeric, 3 positions; optional.

Completing the Create or Change Promotion Screen

Completing this screen: Once you create or change a promotion, you might advance to the:

- [Work with Qualifying Source Codes Screen](#): if you have specified a *Qualifying source*.
- [Work with Promotion Discounts Screen](#): if you are setting up a *Tiered Discount or Free Gift* promotion.
- [Work with Qualifying Customer/Price Groups Screen](#): if you have specified a *Qualifying customer#* or *Qualifying customer group*.
- [Work with Qualifying Item Categories Screen](#): if you are setting up an *Item Category Discount* promotion.
- [Work with BOGO Discount Screen \(Item Category or Item\)](#): if you are setting up a *BOGO (Buy One/Get One) Discount or Free Gift by Item Category or Item* promotion.

Work with Qualifying Source Codes Screen

Purpose: Use this screen to review and work with the qualifying source codes for a promotion. An order qualifies for a promotion if one of the source codes listed is on the order header, and the order also meets all other criteria specified at the *Create Promotion Screen* or the *Change Promotion* screen. See *Promotion Logic and Processing* for a discussion.

How to display this screen: Complete the *Create Promotion Screen*, *Change Promotion* screen, *Copy Promotion Screen*, or the *Display Promotion* screen for a promotion that has a Qualifying source.

**Note:**

If you advance to this screen from the Display Promotion screen, all fields are display-only.

Field	Description
Promotion code	The code identifying the promotion you are currently working with. The description is to the right. Code: alphanumeric, 7 positions; display-only. Description: alphanumeric, 30 positions; display-only.
Source code	A source code that must be used on the order header for an order to qualify for the promotion. The first qualifying source code alphanumerically is displayed in the Qualifying source field on the Change Promotion screen and the Display Promotion screen. <i>Adding a qualifying source:</i> Enter a source code in the Source code field at the top of the screen to add it as a qualifying source code for the promotion. An error message indicates if you enter a source code that has the Exclude promotion field <i>selected</i> : Source code flagged to exclude promotions.
	 Note: Qualifying a promotion by source code differs from assigning the promotion to the source code in order to force a pop-up message to open or give the promotion highest priority in order entry.
	Source codes are defined in and validated against the Source file. See Working with Source Codes (WSRC) . Alphanumeric, 7 positions; optional.
Description	The description of the source code. Alphanumeric, 30 positions; display-only.

Instructions: Enter a source code in the Source code field to add it as a qualifying source code for the selected promotion.

After you complete this screen, you might advance to a subsequent screen. See [Completing the Create or Change Promotion Screen](#) for more information.

Work with Promotion Discounts Screen

Purpose: Use this screen to identify the discounts or free items available for each tier in a tiered promotion, and the required merchandise amount for each. See [Tiered Discount or Free Gift](#) for more information on how tiered promotions work.

How to display this screen: Complete the [Create Promotion Screen](#), Change Promotion screen, [Copy Promotion Screen](#), or the Display Promotion screen for a tiered promotion.

Field	Description
Promotion code	The code identifying the promotion you are currently working with. The description is to the right. Code: alphanumeric, 7 positions; display-only. Description: alphanumeric, 30 positions; display-only.
Merch amount	The total merchandise value required for an order to qualify for this tier of a promotion. The system evaluates the qualifying dollar amount after other repricing, such as price tables or an order-level discount percentage, is applied to the merchandise total. If there are multiple shipping addresses on the order, this is the merchandise total required for the shipping address. <i>Highest tier only:</i> When assigning the promotion to an order, the system assigns the highest tier for which the order qualifies. For example, if there is a discount of 10% for a merchandise amount of \$50.00, and a discount of 15% for a merchandise amount of \$75.00, an order with a merchandise total of \$75.00 receives a 15% discount. <i>Which items count toward total?</i> When evaluating an order to see if it meets the required merchandise total, the system does not include non-discountable items (based on the setting of the Discountable flag for the item). Numeric, 13 positions with a 2-place decimal; required. Enter either a dollar discount, percent discount, or free item for each tier.
Dollar discount	The dollar discount amount to apply to the order when the merchandise value meets the requirement for this tier but not for the next tier. This amount is prorated against the dollar value of order lines if you do not enter an additional charge code at the <i>Create Promotion Screen</i>; otherwise, the discount is added to the order as a negative additional charge. See <i>Prorating Logic</i> for more information on the prorating calculation. <i>Include sale item?</i> The specified discount applies to sale items if the <i>Exclude Sale Item When Prorating Discounts (I65)</i> is <i>unselected</i>. See that system control value for more information. Numeric, 13 positions with a 2-place decimal; optional.
Percent discount	The percentage to discount the merchandise on the order when the merchandise value meets the requirement for this tier but not for the next tier. This percentage is applied proportionally to each order line's extended price if the discount is prorated (that is, you do not enter an additional charge code); otherwise, the total merchandise discount is added to the order as a negative additional charge. <i>Include sale item?</i> The specified discount applies to sale items if the <i>Exclude Sale Item When Prorating Discounts (I65)</i> is <i>unselected</i>. See that system control value for more information. Numeric, 5 positions with a 2-place decimal; optional.

Field	Description
Free item	The free item to add to the order when the merchandise value meets the requirement for this tier but not for the next tier. The system adds the item to the order after you select the <i>Reprice</i> option or accept the order. Price override reason: The system applies the Price Override Code for Promotional Priced Lines (B61) to the order line when it adds the free gift. If this system control value is blank, the free gift is not added to the order.

Note:

If you are using [Promotion Hierarchy: Best Way](#) and an order qualifies for multiple tiered promotions offering free gifts, the promotion offering the free gift with the highest value applies to the order.

Item: alphanumeric, 12 positions; optional.
SKU: alphanumeric, three 4-position fields; required if the item has SKUs.

Option	Procedure
Switch between the display of existing tiers and enterable fields to add new promotion tiers	Select <i>Change</i> to switch between <i>ADD</i> and <i>CHANGE</i> mode. Options in ADD mode: This is the default mode when you advance to this screen from the <i>Create Promotion Screen</i>. In this mode, you can add new tiers for the promotion. If a tier already exists for the Merch amount specified for your entry, the system displays an error message. Options in CHANGE mode: This is the default mode when you advance to this screen from the Change Promotion screen. In this mode, you can: - review existing tiers for the promotion - change the type of discount for a Merch amount (Dollar discount, Percent discount, or Free item), including changing the value for each field or switching from one type of discount to another. You cannot change the Merch amount; instead, you need to delete it and create a new tier. - delete a tier by selecting <i>Delete</i> for it

Copy Promotion Screen

Purpose: Use this screen to copy an existing promotion.

How to display this screen: Select *Copy* for a promotion at the *Work with Promotions Screen*.

To copy: Complete the *Promotion code* field and change any desired settings from the original promotion. See *Create Promotion Screen* for field descriptions, and see [Working with Promotions \(WPRO\)](#) for information about setting up and using promotions.

When you copy a promotion with additional sub tables, you advance to a subsequent screen for each sub-table you would need to copy, so that you can revise the sub-table as needed. For example, when you copy a tiered promotion, you advance to the *Work with Promotion Discounts Screen*, where you can revise the copied tiers as needed. See *Completing the Create or Change Promotion Screen* for a listing of additional screens.

Work with Qualifying Customer/Price Groups Screen

Purpose: Use this screen to specify the individual customers or customer price groups that are eligible for a promotion. The promotion is available only to the specific customers or members of the price groups you specify here.

How to display this screen: Enter a customer number or a customer price group at the *Create Promotion Screen* or the *Change Promotion* screen.



Note:

You can also advance to this screen in display mode by advancing from the Display Promotion screen.

Field	Description
Promotion code	The promotion that you are creating, or that you selected at the <i>Work with Promotions Screen</i> . Alphanumeric, 7 positions; display-only
Promotion description (unlabeled field to the right of the promotion code)	The description of the promotion. Alphanumeric, 30 positions; display-only.
Group	Enter a customer price group code to make members of the group eligible for the promotion. Group codes are defined in and validated against the Customer Price Group table. See Working with Customer Price Groups (WCPG) for more information. Alphanumeric, 4 positions; optional.
Customer	Enter a customer number to make that customer eligible for the promotion. Customer numbers are defined in and validated against the Customer table. See Creating and Updating Sold-to Customers (WCST) for more information. Numeric, 9 positions; optional.
Name	The name of the customer or the description of the customer price group. <i>First 30 positions of customer last name, first name, and company name: If the customer has a last and first name, this information is displayed first; then if the customer has a company name, the company name follows the text ATTN. Otherwise, if the customer has just a company name, the company name is displayed.</i> Alphanumeric, 30 positions; display-only.

Instructions: Enter a customer price group code or enter a customer number to add a record to the Promotion Customer table. If you enter a customer or price group in error, or if the customer or price group is no longer eligible for the promotion, you can *Delete* it.

**Note:**

You cannot scan for additional records at this screen by entering information in search fields; pressing *Enter* adds your entry to the Promotion Customer table.

Reviewing through customer maintenance: You can also view the promotions associated with a specific customer or customer group through [Creating and Updating Sold-to Customers \(WCST\)](#). See the [Display Customer Promotions Screen](#) and the [Display Customer Price Group Promotions Screen](#).

Work with Qualifying Item Categories Screen

Purpose: Use this screen to specify the item categories eligible for an item category promotion.

How to display this screen: Complete the *Create Promotion Screen* or *Change Promotion screen* for an item category promotion.

**Note:**

When you advance to this screen from the Display Promotion screen, it is display-only.

For more information: See [Item Category Discount](#) for an overview of item category promotions.

Field	Description
Promotion code	The promotion code you are creating, or selected to change or display from the <i>Work with Promotions Screen</i> . Alphanumeric, 7 positions; display-only.
Promotion description (unlabeled field to the right of the promotion code)	The description of the promotion. Alphanumeric, 30 positions; display-only.
Category	Enter an item category in this field to specify it for the promotion. An item must be assigned to a category specified here in order to qualify for the promotion. Item category assignment is at the SKU level, and you specify an item category assignment at the Create Item (Base Information) Screen (non-SKU'd item) or the Create SKU 1 of 2 (With Overrides) Screen (SKU'd item). Item category codes are defined in and validated against the Item Category table. See Working with Item Category Codes (WITG) for more information. Alphanumeric, 3 positions; required to add a category.
Description	The description of the item category. Alphanumeric, 30 positions; display-only.

Option	Procedure
Add a qualifying item category	Enter an item category code in the Category field.

Option	Procedure
Delete a qualifying item category	Select the <i>Delete</i> option for an item category.

Work with BOGO Discount Screen (Item Category or Item)

Purpose: Use this screen to work with the discounts or free gifts to apply through a BOGO (Buy One/Get One) promotion based on item category or item. A BOGO promotion first identifies one or more qualifying order line (based on item category, base item, or SKU) and then identifies the type of discount to apply to a matching order line.

For more information: See [BOGO \(Buy One/Get One\) Discount or Free Gift by Item Category or Item](#) for more information on how BOGO promotions apply to orders and on possible setup options.

How to display this screen: Complete the *Create Promotion Screen* or *Change Promotion screen* for a BOGO promotion. When you advance to this screen from the *Display Promotion screen*, all fields are display-only.



Note:

You advance to this screen only if the [BOGO Grouping by Price Code or Category \(L62\)](#) system control value is set to *CATEGORY*; otherwise, if the system control value is set to *PRICE CODE*, you advance to the [Work with BOGO Discounts by Item/Price Code Screen](#).

Field	Description
Promotion	The promotion code you are creating, or selected to change or display from the <i>Work with Promotions Screen</i> . Alphanumeric, 7 positions; display-only.
Promotion description (unlabeled field to the right of the promotion code)	The description of the promotion. Alphanumeric, 30 positions; display-only.
Item category	Use the following fields to specify an item category, the base item of a SKU'd item, a particular SKU, or a non-SKU'd item to include in the BOGO promotion. Optionally, enter an item category in this field to set up a BOGO promotion. You can set up BOGO promotions for item categories, for all SKU's of a SKU'd item, or for specific non-SKU'd items or SKU's. If you set up a promotion based on item category, you cannot select the Allow mult flag or set the Free flag to <i>Free Auto Add</i>; these options are available only when you set up the promotion for a non-SKU'd item or an individual SKU of a SKU'd item. <i>About item categories:</i> Item category assignment is at the SKU level, and you specify an item category assignment at the Create Item (Base Information) Screen (non-SKU'd item) or the Create SKU 1 of 2 (With Overrides) Screen (SKU'd item). Item category codes are defined in and validated against the Item Category table. See Working with Item Category Codes (WITG) for more information. Alphanumeric, 3 positions; required to add a category.

Field	Description
Item	Optionally, enter an item code in this field to include it in the BOGO promotion. If the item has SKU's, you can enter a particular SKU to restrict the BOGO promotion to that SKU only; or you can leave the SKU fields blank to apply the promotion to all SKU's on the order. If you set up a promotion based on all SKU's of a SKU'd item, you cannot select the Allow mult flag or set the Free flag to <i>Free Auto Add</i>; these options are available only when you set up the promotion for a non-SKU'd item or an individual SKU of a SKU'd item. Item: alphanumeric, 12 positions; required to set up a promotion based on item. SKU: alphanumeric, three 4-position fields; optional.
Req qty (required quantity)	The quantity of the items in the item category, or of the particular item or SKU, required for the order to qualify for the promotion. Numeric, 5 positions; required.
BOGO qty	The quantity of the item to receive the BOGO discount, to be set to no charge, or to be added at no charge. Numeric, 5 positions; required.
Free	Indicates whether the BOGO order line is discounted, changed to no charge, or added automatically at no charge. • <i>No</i> = The item is discounted but not free • <i>Free</i> = The promotion changes an existing item on the order to no charge • <i>Free auto add</i> = The system adds an item to the order at no charge. This option is available only when your entry is for a non-SKU'd item, or for a specific SKU of a SKU'd item.
Allow mult (allow multiples)	Indicates whether to apply the discount more than once if the ordered quantity is a multiple of the qualifying quantity. • <i>Selected</i> = Orders can qualify for this BOGO discount multiple times. For example, if the promotion specifies "buy five, get one free," selecting this field enables the customer to also buy ten, get two free; buy 15, get three free; and so on. • <i>Unselected</i> = Apply this BOGO discount once only per order. For example, if the promotion specifies "buy five, get one free," the customer still receives the BOGO discount on just one unit even if the order includes ten, 15, or more units.

 Note:

Allowing multiples is supported only for BOGO discounts based on a non-SKU'd item or a specific SKU of an item.

IMPORTANT: If you select the Allow multiples setting for any BOGO promotions, then the order line quantity should be 1 for every order line on an order that might be eligible for the promotion; otherwise, the BOGO promotion might not apply correctly. To help ensure that the order line quantity is always 1, you can set both the [Default Order Quantity \(B30\)](#) and [Maximum Order Quantity \(C60\)](#) system control values to 1.

Provided you have not set up the BOGO discount as free, use one of the following fields to specify a discount percentage, discount dollar amount, or discount price.

Field	Description
Disc %	The percentage discount to apply to the BOGO order line. For example, if the promotion is buy two, get one at 25% off, you enter 25.00 here. Numeric, 5 positions with a 2-place decimal; optional.
Disc \$	The per-unit discount amount to apply to the BOGO order line. For example, if the promotion is buy five, get two at \$1.00 off, you enter 1.00 here. Numeric, 13 positions with a 2-place decimal; optional.
Price	The override price to apply to the BOGO order line. For example, if the promotion is buy eight, get one at \$7.99, you enter 7.99 here. Numeric, 13 positions with a 2-place decimal; optional.

Option	Procedure
Add a BOGO discount entry	Complete the fields at the top of the screen, including: • an Item category OR an Item and, optionally, a SKU • the Req qty • the BOGO qty • A setting for the Free field • Optionally, select the Allow mult flag if the entry is not for an item category • Disc % OR Disc \$ OR Price if the BOGO is not free See the field descriptions above for more information.

 Note:

You cannot scan for additional records at this screen by entering information in search fields; pressing *Enter* adds your entry to the Promotion Item Exclusion table.

Change an existing BOGO discount entry	Select <i>Change</i> for an entry to advance to the Work with BOGO Discount Screen (Item Category or Item) .
Delete a BOGO discount entry	Select <i>Delete</i> for an entry to delete it from the promotion.

Change BOGO Discount Screen

Purpose: Use this screen to change an existing entry for a BOGO promotion based on item category or item. At this screen, you can change only the benefits of the entry; you cannot change the qualifying item category, item, SKU, or required quantity. To change this information, delete the BOGO entry at the *Work with BOGO Discount Screen (Item Category or Item)* and enter a new one.

This screen is available only if the [BOGO Grouping by Price Code or Category \(L62\)](#) system control value is set to *ITEM CATEGORY*.

How to display this screen: Select *Change* for an entry at the [Work with BOGO Discount Screen \(Item Category or Item\)](#).

Field	Description
Promotion	The promotion code you are creating, or selected to change or display from the <i>Work with Promotions Screen</i> . Alphanumeric, 7 positions; display-only.
Promotion description (unlabeled field to the right of the promotion code)	The description of the promotion. Alphanumeric, 30 positions; display-only.
Item category	The item category, if any, you selected at the <i>Work with BOGO Discount Screen (Item Category or Item)</i> . Alphanumeric, 3 positions; display-only.
Item	The item and SKU, if any, you selected at the <i>Work with BOGO Discount Screen (Item Category or Item)</i> . Item: alphanumeric, 12 positions; display-only. SKU: alphanumeric, three 4-position fields; display-only.
Req qty (required quantity)	The quantity of the items in the item category, or of the particular item or SKU, required for the order to qualify for the promotion. Numeric, 5 positions; display-only.
BOGO qty	The quantity of the item to receive the BOGO discount to be set to no charge, or to be added at no charge. Optionally, enter a different quantity to change it. Numeric, 5 positions; required.
Free	Indicates whether the BOGO order line is discounted, changed to no charge, or added automatically at no charge. • <i>No</i> = The item is discounted but not free • <i>Free</i> = The promotion changes an existing item on the order to no charge • <i>Free auto add</i> = The system adds an item to the order at no charge. This option is available only when your entry is for a specific item, or a SKU of a SKU'd item.

Field	Description
Allow mult (allow multiples)	Indicates whether to apply the discount to the BOGO order line more than once if the ordered quantity is a multiple of the qualifying quantity. <i>Selected</i> = Orders can qualify for this BOGO discount multiple times. For example, if the promotion specifies “buy five, get one free,” selecting this field enables the customer to also buy ten, get two free; buy 15, get 3 free; and so on. <i>Unselected</i> = Apply this BOGO discount once only per order. For example, if the promotion specifies “buy five, get one free,” the customer still receives the BOGO discount on just one unit even if the order includes ten, 15, or more units.
	 Note: Allowing multiples is supported only for BOGO discounts based on a non-SKU'd item or a specific SKU of an item.
	IMPORTANT: If you select the Allow multiples setting for any BOGO promotions, then the order line quantity should be 1 for every order line on an order that might be eligible for the promotion; otherwise, the BOGO promotion might not apply correctly. To help ensure that the order line quantity is always 1, you can set both the <i>Default Order Quantity (B30)</i> and <i>Maximum Order Quantity (C60)</i> system control values to 1. Provided you have not set up the BOGO discount as free, use one of the following fields to specify a discount percentage, discount dollar amount, or discount price.
Disc %	The percentage discount to apply to the BOGO order line. For example, if the promotion is buy two, get one at 25% off, you enter 25.00 here. Numeric, 5 positions with a 2-place decimal; optional.
Disc \$	The per-unit discount amount to apply to the BOGO order line. For example, if the promotion is buy five, get two at \$1.00 off, you enter 1.00 here. Numeric, 13 positions with a 2-place decimal; optional.
Price	The override price to apply to the BOGO order line. For example, if the promotion is buy eight, get one at \$7.99, you enter 7.99 here. Numeric, 13 positions with a 2-place decimal; optional.

Work with BOGO Discounts by Item/Price Code Screen

Purpose: Use this screen to work with the discount or free gift to apply through a BOGO (Buy One/Get One) promotion based on price code. A BOGO promotion first identifies one or more qualifying order lines (based on price code, base item, or SKU) and then identifies the type of discount to apply to a matching order line.

Single discount or free gift: This screen enables you to set up only a single discount or free gift for the promotion. If a discount or free gift already exists for the promotion, it is displayed in the lower portion of the screen. You can select *Change* or *Display* to review the details.

For more information: See [Working with Price Codes \(WPCD\)](#) for information on setting up price codes, and see [Assigning Price Codes \(APCD\)](#) for information on assigning price codes to items.

How to display this screen: Complete the *Create Promotion Screen* or *Change Promotion Screen* for a BOGO promotion. When you advance to this screen from the *Display Promotion Screen*, all fields are display-only.

**Note:**

You advance to this screen only if the *BOGO Grouping by Price Code or Category (L62)* system control value is set to *PRICE CODE*; otherwise, you advance to the *Work with BOGO Discount Screen (Item Category or Item)*.

**Important:**

The available options for configuring a BOGO promotion by price code are described under [BOGO \(Buy One/Get One\) Discount or Free Gift by Price Code](#). Using a different configuration option may produce unintended results when the promotion applies to an order.

Field	Description
Promotion	The promotion code you are creating, or selected to change or display from the <i>Work with Promotions Screen</i> . Alphanumeric, 7 positions; display-only.
Promotion description (unlabeled field to the right of the promotion code)	The description of the promotion. Alphanumeric, 30 positions; display-only.
	Use the following fields to specify a price code, the base item of a SKU'd item, a particular SKU, or a non-SKU'd item that qualifies an order for the BOGO promotion.
Price code	The price code that items must be assigned to in order to qualify for the promotion. Defined in and validated against the Price Code table. Numeric, 7 positions; required if you do not specify an item as a qualifier.
Item	The required item for the promotion. Defined in and validated against the Item table. You can enter either an item or a price code as a qualifier.

**Note:**

Using an item as a qualifier for a BOGO promotion by price code is not currently supported.

Alphanumeric, 12 positions; required if you do not specify a price code as a qualifier.

Field	Description
SKU (unlabeled fields to the right of the Item field)	Optionally, use the SKU fields to identify a particular SKU of the item, if any, required for the promotion. Defined in and validated against the SKU table.
	 Note: Using an item as a qualifier for a BOGO promotion by price code is not currently supported.
	Alphanumeric, three 4-position fields; optional.
	Use either the Req amt and Req qty fields, or both fields in combination, to specify the total unit quantity or dollar value required of the price code or item to qualify for the promotion.
Req amt	Optionally, enter the required total dollar value of the required items from the specified price code. If you specify a required amount, the required quantity must meet or exceed this amount. <i>Example:</i> You specify a price code of 123, a required amount of \$500.00, and a required quantity of 1. The order needs to include 1 unit assigned to price code 123 whose dollar value is \$500.00 or more. The order does not qualify if it includes 5 units whose combined total dollar value is \$500, since the requirement must be met within the 1 unit specified in the Req qty field. Numeric, 13 positions with a 2-place decimal; optional if you specify a required quantity.
Req qty (required quantity)	The quantity of the items assigned to the price code required for the promotion. See the Req amt field, above for more information. Numeric, 5 positions; optional if you specify a required amount.
	Use the remaining fields to specify the discount, special price, or free item available to qualifying orders. Any discounts apply to the lowest-priced items on the order.
BOGO qty	The quantity of the items assigned to the BOGO price code to receive the BOGO discount or special price or to be set to no charge. If you select the Prorate flag, this is the quantity of the item used to calculate the total discount to prorate across the required quantity and the BOGO quantity. If you want to make the promotion available to a required merchandise amount of a specified price code without specifying a required quantity, set this field to 99999. For example, set the Req amt to \$500 and set this field to 99999 for a promotion that provides a discount to a total purchase of \$500 within a specified price code. Numeric, 5 positions; required.
BOGO price code	The price code identifying the items eligible for the discount, special price, or to be set to no charge. Required if you do not specify an Auto add item. Can be the same as the qualifying Price code. Defined in and validated against the Price Code table. Numeric, 7 positions; required if you do not specify an Auto add item.

Field	Description
Disc %	The discount percentage to apply to the BOGO quantity, or to use when calculating the total discount to apply against the required quantity and the BOGO quantity if the Prorate field is selected. Required if you do not specify a discount dollar amount or price, or if the Free field is not set to <i>Free</i> or <i>Free auto add</i>. Numeric, 5 positions with a 2-place decimal; optional.
Disc \$	The total discount amount to apply to the BOGO quantity, or to prorate against the required quantity and the BOGO quantity if the Prorate field is selected. Required if you do not specify a discount percentage or price, or if the Free field is not set to <i>Free</i> or <i>Free auto add</i>. Numeric, 13 positions with a 2-place decimal; optional.
Price	The discounted price to apply to the BOGO quantity. If the Prorate flag is selected, The system subtracts this price from the price currently on the order line, and prorates the difference across the required quantity and the BOGO quantity. For example, if both order lines are currently priced at \$10.00, the Price specified here is \$6.00, and the Prorate flag is selected, the system subtracts \$6.00 from \$10.00, and then prorates the result (\$4.00) across the 2 order lines, resulting in a price of \$8.00 for each. Required if you do not specify a discount percentage or amount, or if the Free field is not set to <i>Free</i> or <i>Free auto add</i>. Numeric, 13 positions with a 2-place decimal; optional.
Prorate	Indicates whether to prorate the total discount applied through the promotion: • <i>Selected</i> = prorate the total discount for the promotion across the required quantity and the BOGO quantity or free item • <i>Unselected</i> = apply the entire discount to the BOGO quantity or the free item
Allow mult	Indicates whether to apply the promotion multiple times if the order includes a sufficient required and BOGO quantity: • <i>Selected</i> = Orders can qualify for this BOGO discount multiple times if the number of qualifying items are multiples of the Req qty plus the BOGO qty. For example, if the promotion specifies “buy one, get one free,” selecting this field enables the customer to also buy two, get two free; buy three, get three free; and so on. • <i>Unselected</i> = Apply this BOGO discount once only per order. For example, if the promotion specifies “buy one, get one free,” the customer still receives the BOGO discount on just one unit even if the order includes four, six, or more units.

Field	Description
Free	Indicates whether the BOGO order line is discounted, changed to no charge, or added automatically at no charge. <i>No</i> = The item is discounted but not free. With this setting, you need to specify the <i>BOGO qty</i>, <i>BOGO price code</i>, and either the <i>Disc %</i>, <i>Disc \$</i>, or <i>Price</i>. <i>Free</i> = The promotion changes the price of an item on the order to no charge. With this setting, you need to specify the <i>BOGO qty</i> and <i>BOGO price code</i>, but no other discount options. <i>Free auto add</i> = The system adds the <i>Auto add item</i> to the order at no charge. With this setting, you need to specify the <i>Auto add item</i> and a SKU if the item has SKUs. The system adds a unit of the item to the order regardless of whether the item is already on the order.

 Note:

If the Prorate flag is selected, the price of the free item is prorated across the Req qty and the free item.

Auto add item

Indicates the item to add to the order automatically at no charge. You can specify an auto-add item only if the Free field is set to Free auto add; in this case, the item is required, as well as a SKU if the item has SKUs.

 Note:

This field is labeled Auto item at the *BOGO Discount by Item/Price Code Screen* and the *BOGO Discount by Item/Price Code Screen (Display Mode)*.

Item: 12 positions; required if the Free field is set to Free auto add.
SKU: three 4-position fields; required if the item has SKUs.

Option	Procedure
Create a BOGO discount promotion by price code	See the field descriptions above for more information and <i>BOGO (Buy One/Get One) Discount or Free Gift by Price Code</i> for more information.

 Note:

You can create only one discount for a BOGO promotion by price code.

Option	Procedure
Change the existing BOGO discount promotion	Select <i>Change</i> for the existing promotion to advance to the <i>BOGO Discount by Item/Price Code Screen</i> . Each field on this screen is described above.
Display the existing BOGO discount	Select <i>Display</i> for the existing promotion to advance to the <i>BOGO Discount by Item/Price Code Screen (Display Mode)</i> . Each field on this screen is described above.

BOGO Discount by Item/Price Code Screen

Purpose: Use this screen to review or change the existing discount set up for a BOGO promotion by price code.

How to display this screen: Select *Change* for the existing discount at the [Work with BOGO Discounts by Item/Price Code Screen](#).

For more information: See the [Work with BOGO Discounts by Item/Price Code Screen](#) for field descriptions.

BOGO Discount by Item/Price Code Screen (Display Mode)

Purpose: Use this screen to review the existing discount set up for a BOGO promotion by price code.

How to display this screen: Select *Display* for the existing discount at the [Work with BOGO Discounts by Item/Price Code Screen](#), or select *Display* for a BOGO promotion at the *Work with Promotions Screen* and click OK through the displayed screens.

For more information: Each field on this screen is display-only. See the [Work with BOGO Discounts by Item/Price Code Screen](#) for field descriptions.

Work with Item/Category Exclusions Screen

Purpose: Use this screen to work with items and item categories that are excluded from receiving an order, tiered, item category, or BOGO promotion.

Things to note about item and item category exclusions:

- *Excluded items still included as qualifiers:* Even though the system does not apply a percentage discount or prorated dollar discount amount against the items or item categories you specify here, they are still included when determining whether the order qualifies for the promotion based on the Qualifying \$ amount, Qualifying qty, and Max qty specified for the promotion, provided the order does not consist entirely of excluded items or item categories.

Example: A promotion requires a Qualifying \$ amount of \$50.00 and an order includes two lines: one for an excluded item with an extended price of \$20.00, and one for a non-excluded item with an extended price of \$35.00. The order qualifies for the promotion based on the merchandise total of \$55.00, even though that total is partially based on an excluded item, although the discount does not apply to the excluded item.

- *Order must include at least one non-excluded item:* Even though the excluded items or item categories are included in the qualifiers, an order still cannot receive the promotion if all of the items on the order are excluded.

- *Discount tier based on entire merchandise total:* When a tiered promotion specifies a percentage discount, the percentage that applies is based on the qualifying merchandise total.

Example: An order includes two lines: one for an excluded item with an extended price of \$20.00, and one for a non-excluded item with an extended price of \$20.00. The promotion specifies a 10% discount for a merchandise total of \$20.00, and a 15% discount for a merchandise total of \$40.00. The system applies a 15% discount to the non-excluded item based on the merchandise total of \$40.00, resulting in a discount amount of \$3.00.

- *Freight and additional freight promotions:* You cannot set up item/category exclusions for freight or additional freight promotions.

How to display this screen: Select *Item/Item Category Exclusions* for a promotion at the *Work with Promotions Screen*.

Field	Description
Promotion code	The promotion that you are creating, or that you selected at the <i>Work with Promotions Screen</i> . Alphanumeric, 7 positions; display-only
Promotion description (unlabeled field to the right of the promotion code)	The description of the promotion. Alphanumeric, 30 positions; display-only.
Category	Enter an item category code to exclude items in the category from the promotion. Category codes are defined in and validated against the Item Category table. See Working with Item Category Codes (WITG) for more information. Alphanumeric, 4 positions; optional.
Item	Enter an item code to exclude the item from the promotion.

 Note:

You cannot specify an individual SKU of an item to exclude. If you enter a SKU'd item, all SKU's of the item are excluded.

Item codes are defined in and validated against the Item table. See [Performing Initial Item Entry \(MITM\)](#) for more information.

Alphanumeric, 12 positions; optional.

Instructions: Enter an item category or enter an item code to add a record to the Promotion Item Exclusion table. If you enter an item category or item in error, or if the item or item category is no longer excluded for the promotion, you can delete it.

 Note:

You cannot scan for additional records at this screen by entering information in search fields; pressing *Enter* adds your entry to the Promotion Item Exclusion table.

Work with Promotions by Start Date Screen

Purpose: Use this screen to review and work with promotions in ascending start date sequence. Within start date, promotions sorts in ascending promotion code sequence. See [Working with Promotions \(WPRO\)](#) for an overview of how promotions work, examples of each type, and setup instructions.

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



Note:

The system retains the last view you used in Work with Promotions; instead of advancing to the Work with Promotions by Start Date screen, you may advance to the *Work with Promotions Screen* or [Work with Promotions by End Date Screen](#).

For more information: See the *Work with Promotions Screen* for a description of the fields on this screen and the available screen options.

Work with Promotions by End Date Screen

Purpose: Use this screen to review and work with promotions in ascending end date sequence. Within end date, promotions sorts in ascending promotion code sequence. See [Working with Promotions \(WPRO\)](#) for an overview of how promotions work, examples of each type, and setup instructions.

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



Note:

The system retains the last view you used in Work with Promotions; instead of advancing to the Work with Promotions by End Date screen, you may advance to the *Work with Promotions Screen* or [Work with Promotions by Start Date Screen](#).

For more information: See the *Work with Promotions Screen* for a description of the fields on this screen and the available screen options.

Promotion Upload

Purpose: Use the promotion upload to create or delete promotions and related tables based on the information in the Promotion Upload table.

You can process the upload by:

1. Creating a Promotion Upload text file. See below for information on file contents.
2. Populating the Promotion Upload table with the contents of the file by:
 - Using the [File Storage API](#) to upload the file contents to the FILE_STORAGE table, and then running the *UPPROMO Upload Promotion Code File* (Program name *PFR0134*, Parameter *PRMUPLD*) periodic function to populate the Promotion Upload table, or

- Using the [Work with File Uploads \(WUPL\)](#) menu option to upload the records in the file to the Promotion Upload table.

See [Fields Used in the Promotion Upload by Record Type](#) for a sample record of each type of promotion you can upload.

3. Using the contents of the Promotion Upload table to create or update promotions by:

- selecting *Upload* at the Work with Promotions screen in [Working with Promotions \(WPRO\)](#), or
- submitting the *PRMOUPL Create or Delete Promotions* periodic function (Program name *PRMOUPL*). See [How to Schedule a Job](#) for information on how to schedule when the system executes a periodic process.

When you submit the update to the promotion records:

- For each Promotion Upload record that is not in error, the upload creates the specified record in the Promotion or related table and deletes the Promotion Upload record.
- For each Promotion Upload record in error, the upload sets the [Processed Flag](#) to *E* and updates the [Error Desc](#) field.



Note:

The upload does not delete records in error from the table or attempt to process them again unless the *Processed Flag* and *Error Desc* fields are cleared.

- The upload generates the [Promotion Upload Error Records Report](#) regardless of whether there are any errors.
- The upload then clears the PROMOTION_CACHE, which caches Promotion BOGO, Promotion Item Category, and Promotion Source tables. It does not clear the PROMOTION_LIST_CACHE, which caches the Promotion Customer and Promotion Item Exclusion tables. See [Caching](#) for background.

The discussion of the promotion upload in this topic includes:

- [General Rules for Promotion Uploads](#)
- [Promotion Upload Table \(PRMUPLD\)](#)
- [Fields Used in the Promotion Upload by Record Type](#)
- [Promotion Upload Errors](#)
- [Promotion Upload Error Records Report](#)

General Rules for Promotion Uploads

Creation: You can use the upload to create a record in the Promotion table or any of the related tables:

- Promotion BOGO: see [Promotion Creation \(PRM\)](#)
- Promotion BOGO by Price Code: see [Promotion BOGO Creation \(PRB\)](#)
- Promotion Customer: see [Promotion BOGO by Price Code Creation \(PBP\)](#)
- Promotion Discount: see [Promotion Discount Creation \(PMD\)](#)
- Promotion Item Category: see [Promotion Item Category Creation \(PIC\)](#)
- Promotion Item Exclusion: see [Promotion Item Exclusion Creation \(PIE\)](#)

- Promotion Source: see [Promotion Source Creation \(PRS\)](#)

Deletion: You can use the upload to delete a record in the Promotion table and all its related records. The upload does not provide an option to delete a record in a related table without deleting the Promotion record itself.

Update: It is not possible to update a record through the upload.

**Note:**

To leave any field in the upload file blank, pass a space in an alphanumeric field and a 0 in a numeric field so that the file can be processed without errors. Leaving a field with no space or 0 is interpreted as null in the database and causes errors.

Promotion Upload Table (PRMUPLD)

The following is a complete list of the fields in the Promotion Upload table. The table includes fields used for all possible record types, creating records in the Promotion table and all related tables.

For more information: See:

- [General Rules for Promotion Uploads](#)
- [Fields Used in the Promotion Upload by Record Type](#)
- [Promotion Upload Errors](#)
- [Promotion Upload Error Records Report](#)

Field	Attribute s	Description
Company	numeric, 3 positions	The company where the record should be created or deleted. Defined in and validated against the Company table; see Working with Companies (WCMP) for background. <i>Used for record type:</i> All. <i>Conditions:</i> Required. <i>Error:</i> Invalid Company: the company specified is not valid; however, the record is not listed on the <i>Promotion Upload Error Records Report</i> .

Field	Attributes	Description
Record Type	alphanumeric, 3 positions	The table where the record should be created or deleted. <i>Used for record type:</i> All. <i>Conditions:</i> Required. <i>PRM</i> = Promotions: Create a new promotion, or delete an existing promotion and all related records. See Promotion Creation (PRM). <i>PRB</i> = Promotion BOGO: Used only if the <i>BOGO Grouping by Price Code or Category (L62)</i> system control value is set to <i>CATEGORY</i>. See Promotion BOGO Creation (PRB). <i>PBP</i> = Promotion BOGO by Price Code: Used only if the <i>BOGO Grouping by Price Code or Category (L62)</i> system control value is set to <i>PRICE CODE</i>. See Promotion BOGO by Price Code Creation (PBP). <i>PMD</i> = Promotion Discount: Tiered promotion details. See Promotion Discount Creation (PMD). <i>PRS</i> = Promotion Source: A source code eligible for a promotion. See Promotion Source Creation (PRS). <i>PIC</i> = Promotion Item Category: Item categories eligible for an item category promotion. See Promotion Item Category Creation (PIC). <i>PRC</i> = Promotion Customer: Customers or customer price groups eligible for a promotion. See Promotion Customer Creation (PRC). <i>PIE</i> = Promotion Item Exclusion: Items or item categories excluded from a promotion. See Promotion Item Exclusion Creation (PIE). See General Rules for Promotion Uploads. <i>Error:</i> Record type not found: the record type does not match one of the values listed above, or is blank. The record type is case-sensitive, so lowercase entries are invalid.
Request Type	alphanumeric, 1 position	Indicates whether to add a record, or delete a promotion and all related records. <i>Used for record type:</i> All. <i>Conditions:</i> Required. Valid values: <i>A</i> = add a promotion or a related record type <i>D</i> = delete a promotion and all its related records. This setting is valid only for a record type of <i>PRM</i> (Promotion). To delete any other record type, you can use the screens in Working with Promotions (WPRO) or use the upload to delete the promotion and all its related records. <i>Errors:</i> - Record Already Exists: the Request Type is <i>D</i>, and the Record Type is <i>PIE</i> or <i>PRB</i> - Invalid Request Type: - Request Type is <i>D</i>, and the Record Type is <i>PRS</i>, <i>PIC</i>, <i>PRC</i>, <i>PMD</i>, or - the Request Type is not <i>A</i> or <i>D</i>. The request type is case-sensitive.
Sequence #	numeric, 9 positions (CCYYMMDD format)	A unique number to identify a record in the Promotion Upload table. <i>Used for record type:</i> All. <i>Conditions:</i> Optional; however, required to upload multiple related records for the same promotion and record type at the same time (for example, multiple Promotion Source records for the same promotion).

Field	Attributes	Description
Record Date	numeric, 7 positions (CYYMMDD format)	The date when the record was added. <i>Used for record type:</i> All. <i>Conditions:</i> Required. <i>Error:</i> Invalid Date: no record date is specified.
Processed Flag	alphanumeric, 1 position	The upload sets this flag to <i>E</i> when the record is in error.
Promotion Code	alphanumeric, 7 positions	If the Record Type is <i>PRM</i> , this is the promotion to create or delete; otherwise, this is the promotion associated with the related record, such as a Promotion Source. <i>Used for record type:</i> All. <i>Conditions:</i> Required. <i>Errors:</i> 1. Duplicate Promotion Code: the Record Type is <i>PRM</i> and the promotion already exists. 2. Missing Promotion Code: the Promotion Code field is blank for any Record Type. 3. Invalid Promotion Code: the Promotion Code field is invalid for any Record Type. Note: 1. The upload does not prevent you from entering the promotion code in lower case; however, you would not be able to enter the promotion code in order entry, and instead would need to select it from a list. 2. If the promotion code is blank for a delete request (the Request Type is <i>D</i>), the upload record is flagged as an error, but the Error Desc remains blank.
Description	alphanumeric, 30 positions	The description of the promotion. <i>Used for record type:</i> <i>PRM</i> . <i>Conditions:</i> Required. <i>Error:</i> Missing Description: the Record Type is <i>PRM</i> and there is no description.
Start Date	numeric, 7 positions (CYYMMDD format)	The first date when the promotion is effective. <i>Used for record type:</i> <i>PRM</i> . <i>Conditions:</i> Required. <i>Error:</i> Invalid Start Date: the Record Type is <i>PRM</i> and there is no start date specified, or the date specified is not valid.
End Date	numeric, 7 positions (CYYMMDD format)	The last date when the promotion is effective. Must be on or later than the Start Date. <i>Used for record type:</i> <i>PRM</i> . <i>Conditions:</i> Required. <i>Error:</i> Invalid End Date: the Record Type is <i>PRM</i> and: • there is no end date specified, or • the end date is earlier than the start date, or • the end date is not a valid date

Field	Attributes	Description
Popup 1-4	alphanumeric, 30 positions each	The text to display in a pop-up window in order entry. See Pop up window messages 1-4 for background. <i>Used for record type: PRM.</i> <i>Conditions: Optional.</i>
Priority	numeric, 3 positions	The priority in which the system evaluates whether this promotion applies to an order. See Priority for background. <i>Used for record type: PRM.</i> <i>Conditions: Required.</i> <i>Error: Invalid Priority: the Record Type is PRM and the priority is 0.</i>
Promotion Type	alphanumeric, 1 position	The type of discount to apply to orders that qualify for this promotion. <i>Used for record type: PRM.</i> <i>Conditions: Required if you define any order promotion values. Possible settings are:</i> <i>A = Additional freight</i> <i>B = BOGO</i> <i>C = Item Category</i> <i>F = Freight</i> <i>O = Order</i> <i>T = Tiered discount</i> <i>blank = a message-only promotion</i> See About Messaging Promotions or About Discount Promotions for background. <i>Error: Invalid Promotion Type: the Record Type is PRM and the promotion type specified is not one of the values listed above. The promotion type is case-sensitive, so lowercase entries are invalid.</i>
Promotion ID	alphanumeric, 7 position	A code used to identify or group promotion codes for reporting and analysis. <i>Used for record type: PRM.</i> <i>Conditions: Optional.</i>
Qualify Amount	numeric, 13 positions with a 2-place decimal	Optionally, specify the total merchandise amount required for the order to qualify for the promotion. See the Qualifying \$ amount (Qualifying dollar amount) for a discussion. <i>Used for record type: PRM.</i> <i>Conditions: Valid only for an order, freight, additional freight, or item category promotion (Promotion Type is A, C, F, or O). Optional.</i> <i>Errors:</i> - Invalid Qualifier for Tier Promotion: there is a qualifying amount and the Promotion Type is T - Qualifier Not Valid For Promo Type: there is a qualifying amount and the Promotion Type is B

Field	Attributes	Description
Free Freight	alphanumeric, 1 position	Set to Y if freight is free of charge with this promotion; otherwise set this field to N. See Free freight for a discussion. <i>Used for record type: PRM.</i> <i>Conditions:</i> Used only when the Promotion Type is F (freight) and there is not a Freight override, PRM Dollar Discount, or PRM Percent Discount specified; a freight promotion must specify only one type of discount. <i>Errors:</i> - Discount conflict: both Free freight and Freight override are specified, or no freight discount is specified - Only Valid for Freight Promotion: this is not a freight promotion - Qualifier Not Valid for Free Freight: The Free freight field was not set to Y, N, or blank for a freight promotion. The field is case-sensitive, so lowercase values are invalid.

**Note:**

This field is optional when you create a promotion; however, if it is blank instead of set to N, you will not be able to apply the promotion to an order. The error message displayed in order entry is *Qualifying criteria not met for this promotion*. To update the field and prevent the error from occurring after you initially create the promotion, you can select *Change* for the promotion at the [Work with Promotions Screen](#) and then click *OK* at the Change Promotion screen.

Freight Override	numeric, 13 positions with a 2-place decimal	The override amount to charge for freight with this promotion. See Freight override amount for a discussion. <i>Used for record type: PRM.</i> <i>Conditions:</i> Used only when the Promotion Type is F (freight). Cannot be selected if Free freight, PRM Dollar Discount, or PRM Percent Discount is also selected; a freight promotion must specify only one type of discount. <i>Errors:</i> - Discount conflict: both Free freight and Freight override are specified, or no freight discount is specified - Qualifier Not Valid for Promo Type: this is not a freight promotion

Field	Attributes	Description
PRM Dollar Discount	numeric, 13 positions with a 2-place decimal	The dollar discount to apply for an order, item category, freight, or additional freight promotion. See Discount amount for a discussion. <i>Used for record type: PRM.</i> <i>Conditions:</i> Used only when Promotion Type is <i>A</i>, <i>C</i>, or <i>O</i> (additional freight, item category, or order). Cannot be specified in combination with another discount. Optional. <i>Errors:</i> • <code>Discount required</code>: no discount amount or percent is specified for an additional freight, item category, or order promotion • <code>Discount conflict</code>: more than one discount amount or percent is specified for an additional freight, item category, or order promotion

**Note:**

If a dollar discount is specified for a freight promotion, the [Additional Charge](#) field should specify a valid additional charge code.

PRM Percent Discount	numeric, 5 positions with a 2-place decimal	Specify the percentage discount to apply for an order, item category, freight, or additional freight promotion. See Discount percent for a discussion. <i>Used for record type: PRM.</i> <i>Conditions:</i> Used only when the Promotion Type is <i>A</i>, <i>C</i>, <i>F</i>, or <i>O</i> (additional freight, item category, freight, or order). Cannot be specified in combination with another discount. Optional. <i>Errors:</i> • <code>Discount required</code>: if no discount amount, percent, or freight override is specified • <code>Discount conflict</code>: if more than one discount amount, percent, special price (item category promotion) or freight override is specified

**Note:**

If a percentage discount is specified for a freight promotion, the [Additional Charge](#) field should specify a valid additional charge code.

Field	Attributes	Description
From SCF	alphanumeric, 3 positions	The first (lowest) SCF eligible for a ship via override). <i>Used for record type: PRM.</i> <i>Conditions:</i> Used only when the Promotion Type is A, C, F, or O (additional freight, item category, freight, or order). Valid entry only if there is a Ship Via Override specified; in this case, the From SCF and To SCF are required. <i>Errors:</i> - Qualifier Not Valid for Promotion Type: - this is a BOGO, tiered, or item category promotion (the Promotion Type is B, T, or C), or - the SCF range is not valid, and the country does not match the <i>Default Country for Customer Address (B17)</i> - Invalid From SCF: - The SCF is not valid for the country (either the Override Country, if specified, otherwise, for the <i>Default Country for Customer Address (B17)</i>) - The SCF range is not valid, and the country matches the <i>Default Country for Customer Address (B17)</i>
To SCF	alphanumeric, 3 positions	The last (highest) SCF eligible for a ship via override). See To SCF for a discussion. <i>Used for record type: PRM.</i> <i>Conditions:</i> Used only when the Promotion Type is A, C, F, or O (additional freight, item category, freight, or order). Valid entry only if there is a Ship Via Override specified; in this case, the From SCF and To SCF are required. <i>Errors:</i> - Qualifier Not Valid for Promotion Type: - this is a BOGO, tiered, or item category promotion (the Promotion Type is B, T, or C), or - the SCF range is not valid, and the country does not match the <i>Default Country for Customer Address (B17)</i>. - Invalid From SCF: - The SCF is not valid for the country (either the Override Country, if specified, otherwise, for the <i>Default Country for Customer Address (B17)</i>). - The SCF range is not valid, and the country matches the <i>Default Country for Customer Address (B17)</i>.
Discount Receipt	alphanumeric, 1 position	Not currently implemented. <i>Error: Fields Not In Use: this field is populated.</i>
Customer Pct Discount	alphanumeric, 1 position	Not currently implemented. <i>Error: Fields Not In Use: this field is populated.</i>
Qualify Qty	numeric, 5 positions	The total unit quantity required for an order to qualify for the promotion. See Qualifying quantity for a discussion. <i>Used for record type: PRM.</i> <i>Conditions:</i> Used only when the Promotion Type is NOT B or T (tiered or BOGO). Optional. <i>Error:</i> Qualifier Not Valid for Promotion Type: this is a BOGO or tiered promotion (the Promotion Type is B or T).

Field	Attributes	Description
US Only	alphanumeric, 1 position	Set this field to <i>Y</i> to restrict a freight or additional freight promotion discount, or ship via override, to states in the continental U.S.A; otherwise set it to <i>N</i>. See Continental USA only for a discussion. <i>Used for record type: PRM.</i> Conditions: Used only when the Promotion Type is <i>A</i> or <i>F</i> (additional freight or freight). Valid entry only if there is a Ship Via Override specified. Optional. Errors: - Invalid Continental USA Only Flag: this field is not set to <i>Y</i> or <i>N</i>. This field is case-sensitive, so a lowercase entry causes an error. - Qualifier Not Valid for Promotion Type: this is not an additional freight or freight promotion (Promotion Type of <i>A</i> or <i>F</i>).

 Note:

This field is optional when you create a promotion; however, if it is blank instead of set to *N*, you will not be able to apply the promotion to an order. The error message displayed in order entry is *Qualifying criteria not met for this promotion*. To update the field and prevent the error from occurring after you initially create the promotion, you can select *Change* for the promotion at the [Work with Promotions Screen](#) and then click *OK* at the Change Promotion screen.

Additional Charge	alphanumeric, 2 positions	The additional charge to use when adding a non-prorated discount to an order. See Additional charge code for a discussion. <i>Used for record type: PRM.</i> Conditions: Used only when the Promotion Type is <i>A</i>, <i>F</i>, or <i>O</i> (additional freight, freight, or order). Optional. Not case-sensitive. Errors: - Qualifier Not Valid for Promo Type: The Promotion Type is not <i>A</i>, <i>F</i>, or <i>O</i> (additional freight, freight, or order). - Invalid Add'l Chg Code: The additional charge code specified does not exist. - Additional Charge Code Required: There is no additional charge code specified for a freight promotion.
Offer Number	alphanumeric, 3 positions	The offer that must be associated with the source code on the order header for the order to qualify for the promotion. You cannot specify both an offer and a source code as a promotion qualifier. See Qualifying offer for a discussion. Not case-sensitive. <i>Used for record type: PRM.</i> Conditions: Optional. Errors: - Invalid Offer: The offer specified is not valid. - Either Source code or offer: Both an offer and Source Code are specified.

Field	Attributes	Description
Pay Type	numeric, 2 positions	The pay type that must be used on the order for the order to qualify for the promotion. See Qualifying pay type for a discussion. <i>Used for record type: PRM.</i> <i>Conditions: Optional.</i> <i>Error: Invalid Pay Type: The pay type specified is not valid.</i>
Ship Via Override	numeric, 2 positions	The ship via to replace the current ship via on an order as part of the promotion. See Ship Via Override for a discussion. <i>Used for record type: PRM.</i> <i>Conditions: Used only when the Promotion Type is A, F, or O (additional freight, freight, or order). Optional, but required if the record specifies an Override Country.</i> <i>Errors:</i> - Invalid Ship Via Override: The ship via specified is not valid. - Override Option Not Valid for Promo Type: The promotion type is not A, F, or O (additional freight, freight, or order).
Override Country	alphanumeric, 3 positions	The country eligible to receive the ship via override. See Ship via override and Ship via country for a discussion. <i>Used for record type: PRM.</i> <i>Conditions: Used only when the Promotion Type is A, F, or O (additional freight, freight, or order). Optional, but required if the record specifies a Ship Via Override.</i> <i>Errors:</i> - Invalid Ship Via Override Country: The country specified is not valid. - Ship Via Override Required: The upload record specifies an override country but no Ship via override.

**Note:**

This field is not case-sensitive; however, if the override country is lower case, you will not be able to apply the promotion to an order. The error message displayed in order entry is `Qualifying criteria not met for this promotion`. To update the field and prevent the error from occurring after you initially create the promotion, you can select *Change* for the promotion at the *Work with Promotions Screen*, correct the Ship via country, and then click *OK* at the Change Promotion screen.

Field	Attributes	Description
Source Code	alphanumeric, 9 positions	The source code that must be on the order header for an order to qualify for the promotion. You cannot specify both a source code and an offer as qualifiers. See Qualifying source for a discussion. <i>Used for record type: PRM.</i> <i>Conditions: Optional.</i> <i>Errors:</i> - Invalid Source Code: The source code specified is not valid. - Either Source code or offer: Both an Offer Number and source code are specified.

 Note:

This field is not case-sensitive; however, if the source code is lower case, you will not be able to apply the promotion to an order. The error message displayed in order entry is Qualifying criteria not met for this promotion. To update the field and prevent the error from occurring after you initially create the promotion, you can select *Change* for the promotion at the [Work with Promotions Screen](#), click *OK* to advance to the [Work with Qualifying Source Codes Screen](#), and use that screen to delete and re-add the source code.

Required Entry	alphanumeric, 1 position	Set this field to <i>Y</i> to require entry of this promotion in order entry, and to require that it must be included in the order message for the order API; otherwise, set this field to <i>N</i> if the promotion should apply automatically to qualifying orders. See Required entry for a discussion. <i>Used for record type: PRM.</i> <i>Conditions: Optional.</i>

 Note:

This field is optional when you create a promotion; however, if it is blank instead of set to *N*, you will not be able to apply the promotion to an order. The error message displayed in order entry is Qualifying criteria not met for this promotion. To update the field and prevent the error from occurring after you initially create the promotion, you can select *Change* for the promotion at the [Work with Promotions Screen](#) and then click *OK* at the Change Promotion screen.

Field	Attributes	Description
First Buyer	alphanumeric, 1 position	Set this field to: <i>O</i> = to restrict the promotion to customers who have not previously placed any orders <i>S</i> = to restrict the promotion to customers who have not previously had an order shipped to them See First time buyer for a discussion. <i>Used for record type:</i> PRM. <i>Conditions:</i> Optional. <i>Error:</i> Invalid First Time Buyer: The field is set to any character other than <i>O</i> or <i>S</i>. This field is case-sensitive, so a lowercase entry causes an error.
Qualify Code	alphanumeric, 1 position	Set this field to: <i>O</i> = to include all order lines in the qualifiers for the promotion <i>I</i> = to include only items in a specified item category as qualifiers for the promotion See Qualifying \$ amount type for a discussion. <i>Used for record type:</i> PRM. <i>Conditions:</i> Used only when the Promotion Type is C (item category). Optional. <i>Errors:</i> - Qualify Code required: No Qualify Code is specified, but there is a Qualify Amount specified for the item category promotion. - Qualifier Not Valid for Promo Type: Possible reasons: - This is not an item category promotion. - The field is not set to <i>O</i> or <i>I</i>. The record type is case-sensitive, so lowercase entries are invalid.
Ship Via Priority	numeric, 1 position	The priority that must be assigned to the ship via on the order header for the order to qualify for the promotion. See Qualifying via priority for a discussion. <i>Used for record type:</i> PRM. <i>Conditions:</i> Optional.
Special Price	numeric, 13 positions with a 2-place decimal	The price to apply to qualified items for an item category promotion. See Item category special price for a discussion. <i>Used for record type:</i> PRM. <i>Conditions:</i> Used only when the Promotion Type is C (item category). Optional, but you need to specify either a PRM Dollar Discount, PRM Percent Discount, or Special Price for an item category promotion. <i>Error:</i> - Special Price Not Valid: A special price is specified even though the promotion type is not C. - Discount Conflict: There is more than one discount (PRM Dollar Discount, PRM Percent Discount, or Special Price) specified for an item category promotion.
Max Qty	numeric, 5 positions	The maximum number of units an order can include to qualify for the promotion. See Max qty for a discussion. <i>Used for record type:</i> PRM. <i>Conditions:</i> Optional.

Field	Attributes	Description
		The fields that are labeled <i>PRB</i> update the Promotion BOGO table. This table is used only if the <i>BOGO Grouping by Price Code or Category (L62)</i> system control value is set to <i>CATEGORY</i> . See the Work with BOGO Discount Screen (Item Category or Item) for background.
PRB Item Cgy	alphanumeric, 4 positions	An item category that qualifies for the BOGO promotion. See the Item category field at the Work with BOGO Discount Screen (Item Category or Item) for a discussion. <i>Used for record type: PRB.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>CATEGORY</i>. Optional, but you need to specify either a PRB Item Cgy or PRB Item for an item category promotion. <i>Errors:</i> - Invalid Item Category: The specified item category is invalid. - Item Cat or Item as Qualifier: Both PRB Item Cgy and the PRB Item are specified. - Item Category Not Valid for Auto Add: You cannot set the PRB Free field to <i>A</i> if you use item category as a qualifier. - Missing Item or Item Cat: Neither the PRB Item Cgy or the PRB Item is specified.
PRB Item	alphanumeric, 12 positions	An item that qualifies for the BOGO promotion. See the Item field at the Work with BOGO Discount Screen (Item Category or Item) for a discussion. <i>Used for record type: PRB.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>CATEGORY</i>. Optional, but you need to specify either a PRB Item or PRB Item Cgy. <i>Errors:</i> - Invalid Item: The item specified is not valid. - Item Cat or Item as Qualifier: Both PRB Item Cgy and the PRB Item are specified. - Missing Item: A PRB SKU is specified but not an item. - Missing Item or Item Cat: Neither the PRB Item Cgy or the PRB Item is specified.

**Note:**

If you set the [PRB Free](#) field to *A* to automatically add an item, you should either use the PRB Item field to specify a non-SKU'd item, or use both the PRB Item and PRB SKU fields to specify the particular SKU of a SKU'd item.

Field	Attributes	Description
PRB SKU	alphanumeric, 14 positions	A SKU that qualifies for the BOGO promotion. See the <i>Item</i> field at the <i>Work with BOGO Discount Screen (Item Category or Item)</i> for a discussion. <i>Used for record type: PRB.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>CATEGORY</i>. Optional. <i>Errors:</i> 1. Invalid SKU: The SKU is invalid, or specified for a non-SKU'd item 2. Missing Item: A SKU is specified, but not a PRB Item
PRB Required Qty	numeric, 5 positions	The quantity of the item category, item, or SKU required for the BOGO promotion. Updates the <i>Req qty (required quantity)</i> field for the BOGO Promotion. <i>Used for record type: PRB.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>CATEGORY</i>. Required. <i>Error:</i> Missing Required Qty: No required quantity is specified.
PRB BOGO Qty	numeric, 5 positions	The quantity of the item to receive the discount, to be set to no charge, or to be added at no charge. Updates the <i>BOGO qty</i> field for the BOGO Promotion. <i>Used for record type: PRB.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>CATEGORY</i>. Required. <i>Error:</i> Missing BOGO Qty: No BOGO quantity is specified.
PRB Discount Pct	numeric, 5 positions with a 2-place decimal	Specify the percentage discount to apply to the BOGO order line. Updates the Disc % at the <i>Work with BOGO Discount Screen (Item Category or Item)</i>. If you do not set the <i>PRB Free</i> field to <i>Y</i> (free) or <i>A</i> (Free Auto Add), you can specify either a PRB Discount Pct, PRB Discount Amt, or PRB Spc Price. <i>Used for record type: PRB.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>CATEGORY</i>. Optional.
PRB Discount Amt	numeric, 13 positions with a 2-place decimal	Specify the discount amount to apply to the BOGO order line. Updates the Disc \$ at the <i>Work with BOGO Discount Screen (Item Category or Item)</i>. If you do not set the <i>PRB Free</i> field to <i>Y</i> (free) or <i>A</i> (Free Auto Add), you can specify either a PRB Discount Pct, PRB Discount Amt, or PRB Spc Price. <i>Used for record type: PRB.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>CATEGORY</i>. Optional.
PRB Spc Price	numeric, 13 positions with a 2-place decimal	Specify the special price to apply to the BOGO order line. Updates the Price at the <i>Work with BOGO Discount Screen (Item Category or Item)</i>. If you do not set the <i>PRB Free</i> field to <i>Y</i> (free) or <i>A</i> (Free Auto Add), you can specify either a PRB Discount Pct, PRB Discount Amt, or PRB Spc Price. <i>Used for record type: PRB.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>CATEGORY</i>. Optional.

Field	Attributes	Description
PRB Multiple Allowed	alphanumeric, 1 position	Set this field to <i>Y</i> to allow the BOGO discount to apply multiple times to an order, or set it to <i>N</i> to allow the discount to apply just once per order. See the Allow mult (allow multiples) field for background. <i>Used for record type: PRB.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>CATEGORY</i>. Optional (but if you leave this field blank, the system treats it as a setting of <i>N</i> when evaluating the BOGO promotion for an order). Case-sensitive. <i>Error:</i> Invalid Multiple Allowed: The setting was not <i>N</i>, <i>Y</i>, or blank.
PRB Free	alphanumeric, 1 position	Use this field to indicate whether the BOGO order line is discounted, changed to no charge, or added automatically at no charge. Valid values: <i>N</i> = The item already on the order is discounted. You need to specify either a PRB Discount Pct, PRB Discount Amt, or PRB Spc Price. <i>Y</i> = The item already on the order is changed to no charge. With this setting, you should not specify a PRB Discount Pct, PRB Discount Amt, or PRB Spc Price. <i>A</i> = The promotion adds the PRB Item (and PRB SKU, if the item has SKU's) to the order at no charge. With this setting, you should not specify a PRB Discount Pct, PRB Discount Amt, or PRB Spc Price, and you should use the PRB Item and PRB SKU fields to specify a valid non-SKU'd item or a particular SKU of a SKU'd item. <i>Used for record type: PRB.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>CATEGORY</i>. Required. <i>Error:</i> Required for Record Type: This field is not set to <i>N</i>, <i>Y</i>, or <i>A</i> for a <i>PRB</i> record. The fields that are labeled <i>PBP</i> update the Promotion BOGO by Price Code table. This table is used only if the <i>BOGO Grouping by Price Code or Category (L62)</i> system control value is set to <i>PRICE CODE</i>. See the Work with BOGO Discounts by Item/Price Code Screen for more information.
PBP Price Code	numeric, 3 positions	The price code required to qualify for the promotion. Updates the Price code at the <i>Work with BOGO Discounts by Item/Price Code Screen</i>. <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>. The promotion can use either a price code or an item as a qualifier. Required if there is no PBP Item specified. <i>Errors:</i> - Price Code or Item as Qualifier: Both the PBP Price Code and the PBP Item are specified, or neither is specified. - Invalid Price Code: The PBP Price code specified is invalid.

Field	Attributes	Description
PBP Item	alphanumeric, 12 positions	The item required to qualify for the promotion. Updates the Item at the Work with BOGO Discounts by Item/Price Code Screen. <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>. The promotion can use either a price code or an item as a qualifier. Required if there is no PBP Price Code specified. Not case-sensitive. <i>Errors:</i> - Price Code or Item as Qualifier: Both the PBP Price Code and the PBP Item are specified, or neither is specified - Invalid Item: The PBP Item specified is invalid. - Missing Item: There is a PBP Sku specified but no PBP Item.
PBP Sku	alphanumeric, 14 positions	The SKU required to qualify for the promotion. Updates the SKU at the Work with BOGO Discounts by Item/Price Code Screen <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO), the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>, and the PBP Item is a SKU'd item. Optional, even if the PBP Item has SKU's. <i>Error: Invalid SKU:</i> - The PBP Item is not a SKU'd item, but a SKU is specified. - The PBP Sku specified is not valid for the PBP Item.
PBP Required Amount	numeric, 13 positions with a 2-place decimal	The dollar value total required for the PBP Required Qty to qualify for the promotion. Updates the Req Amt at the Work with BOGO Discounts by Item/Price Code Screen. <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>. Required if there is no PBP Required Qty; otherwise, optional (you can specify both a required quantity and a required amount). <i>Error: Missing Bogo Qualifier:</i> No PBP Required Qty or PBP Required Amount is specified.
PBP Required Qty	numeric, 5 positions	The total quantity required of the PBP Price Code or PBP Item to qualify for the promotion. Updates the Req Amt at the Work with BOGO Discounts by Item/Price Code Screen. <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>. If there is also a PBP Required Amount, then the number of units specified here must meet or exceed the PBP Required Amount; however, if the PBP Required Qty is 99999, that means that a quantity of 1 or more meets the requirement for the promotion. Required if there is no PBP Required Amount; otherwise, optional (you can specify both a required quantity and a required amount). <i>Error: Missing Bogo Qualifier:</i> No PBP Required Qty or PBP Required Amount is specified.

Field	Attributes	Description
PBP BOGO Prc	numeric, 3 positions	The price code eligible for the promotion discount or special price. Updates the BOGO price code at the <i>Work with BOGO Discounts by Item/Price Code Screen</i>. <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>. With this setting, the PBP Free flag should be set to <i>N</i>, no PBP Auto Add item or PBP Add SKU should be specified, and the PBP BOGO Qty and a discount (either the PBP Discount Pct, PBP Discount Amount, or PBP Special Price) are required. Optional. <i>Errors:</i> - Invalid BOGO Price Code: The PBP BOGO Prc specified is not valid. - Price Code or Item As Qualifier: A PBP BOGO Prc is specified and the PBP Free flag is set to <i>A</i>.
PBP BOGO Qty	numeric, 5 positions	The quantity of the item to receive the discount percentage, discount amount, or special price. Updates the BOGO qty at the <i>Work with BOGO Discounts by Item/Price Code Screen</i>. <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO), and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>. With this setting, the PBP Free flag should be set to <i>N</i>, no PBP Auto Add item or PBP Add SKU should be specified, and the PBP BOGO Prc (price code) and a discount (either the PBP Discount Pct, PBP Discount Amount, or PBP Special Price) are required. Required if the PBP Free setting is not <i>Y</i> or <i>A</i>. <i>Errors:</i> - Price Code or Item as Benefit: A PBP BOGO Qty is specified and the PBP Free flag is set to <i>A</i>. - Auto Add Not Selected: No PBP BOGO Qty is specified, and the PBP Free flag is not set to <i>A</i>.
PBP Discount Pct	numeric, 5 positions with a 2-place decimal	The percentage discount to apply to the PBP BOGO Qty. Updates the Disc % at the <i>Work with BOGO Discounts by Item/Price Code Screen</i>. <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO), the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>, and the PBP Free setting is <i>N</i>; in this case, either the PBP Discount Pct, PBP Discount Amount, or the PBP Special Price is required. <i>Errors:</i> - Missing Bogo Discount: None of the required discounts (PBP Discount Pct, PBP Discount Amount, or the PBP Special Price) are specified. - BOGO Discount Conflict: More than one of the required discounts (PBP Discount Pct, PBP Discount Amount, or the PBP Special Price) is specified.

Field	Attributes	Description
PBP Discount Amount	numeric, 13 positions with a 2-place decimal	The discount amount to the PBP BOGO Qty. Updates the Disc \$ at the <i>Work with BOGO Discounts by Item/Price Code Screen</i>. <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO), the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>, and the PBP Free setting is <i>N</i>; in this case, either the PBP Discount Pct, PBP Discount Amount, or the PBP Special Price is required. <i>Errors:</i> - Missing Bogo Discount: None of the required discounts (PBP Discount Pct, PBP Discount Amount, or the PBP Special Price) is specified. - BOGO Discount Conflict: More than one of the required discounts (PBP Discount Pct, PBP Discount Amount, or the PBP Special Price) is specified.
PBP Special Price	numeric, 13 positions with a 2-place decimal	The special price to apply to the PBP BOGO Qty. Updates the Price at the <i>Work with BOGO Discounts by Item/Price Code Screen</i>. <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO), the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>, and the PBP Free setting is <i>N</i>; in this case, either the PBP Discount Pct, PBP Discount Amount, or the PBP Special Price is required. <i>Errors:</i> - Missing Bogo Discount: None of the required discounts (PBP Discount Pct, PBP Discount Amount, or the PBP Special Price) are specified. - BOGO Discount Conflict: More than one of the required discounts (PBP Discount Pct, PBP Discount Amount, or the PBP Special Price) is specified.
PBP Prorate Disc	alphanumeric, 1 position	Set this flag to <i>N</i> to apply the total discount amount to the discounted or free item, or set it to <i>Y</i> to prorate the discount across the required quantity and the BOGO quantity. Updates the Prorate flag at the <i>Work with BOGO Discounts by Item/Price Code Screen</i>. <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>. Case-sensitive. Required. <i>Error:</i> Prorate Discount Invalid: The PBP Prorate Disc flag is not set to <i>Y</i> or <i>N</i>.
PBP Multiple Allowed	alphanumeric, 1 position	Set this flag to <i>N</i> if the promotion can apply just once to an order, or set it to <i>Y</i> if the promotion can apply multiple times when there is a sufficient quantity of the specified item or price code. Updates the Allow mult flag at the <i>Work with BOGO Discounts by Item/Price Code Screen</i>. <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>. Case-sensitive. Required. <i>Error:</i> Invalid Allow Multiples Value: The PBP Multiple Allowed flag is not set to <i>Y</i> or <i>N</i>.

Field	Attributes	Description
PBP Free	alphanumeric, 1 position	Indicates the type of benefit for the promotion: <i>A</i> = Free Auto Add: Add the PBP Auto Add item to the order automatically. <i>N</i> = No: There is no auto-add item. Apply a discount or a special price to the BOGO quantity. <i>Y</i> = Free: There is no auto-add item. Set the BOGO quantity to no charge. Updates the Free field at the <i>Work with BOGO Discounts by Item/Price Code Screen</i>. <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO) and the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>. Case-sensitive. Required. <i>Errors:</i> - Price Code or Item as Benefit: The PBP Free field is set to <i>A</i> (auto-add), but there is also a PBP BOGO Qty specified; or there is no PBP Auto Add item specified; or the PBP Add SKU is not a valid SKU for the PBP Auto Add. - Price Code or Item As Qualifier: The PBP Free field is set to <i>A</i> (auto-add), but there is also a PBP BOGO Prc specified. - Required Field For This Type: The PBP Free field is not set to <i>A</i>, <i>N</i>, or <i>Y</i>. - Missing Bogo Discount: The PBP Free field is set to <i>N</i>, but a PBP Auto Add item is specified.
PBP Auto Add	alphanumeric, 12 positions	Indicates the item to add to the order. Updates the Auto add item field at the <i>Work with BOGO Discounts by Item/Price Code Screen</i>. <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO), the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>, and the PBP Free flag is set to <i>A</i>. Required if the PBP Free flag is set to <i>A</i>. Case-sensitive only for non-SKU'd items. <i>Errors:</i> - Missing Bogo Qualifier: An auto-add item is specified as well as a PBP Discount Pct or PBP Discount Amount. - Price Code or Item As Qualifier: An auto-add item is specified as well as a PBP BOGO Prc. - Invalid Auto Add Item: The item specified is invalid. - Missing Auto Add SKU: The item specified has SKU's, but no PBP Add SKU is specified. - Auto Add Not Selected: An item is specified, but the PBP Free flag is set to <i>Y</i> rather than <i>A</i>. - Price Code or Item as Benefit: The PBP Add SKU specified is not a valid SKU for this item.

Field	Attributes	Description
PBP Add SKU	alphanumeric, 14 positions	The SKU of the PBP Auto Add item to add to the order. Updates the SKU for the Auto add item at the <i>Work with BOGO Discounts by Item/Price Code Screen</i>. <i>Used for record type: PBP.</i> <i>Conditions:</i> Used only when the promotion type is <i>B</i> (BOGO), the <i>BOGO Grouping by Price Code or Category (L62)</i> is set to <i>PRICE CODE</i>, and the PBP Free flag is set to <i>A</i>. Required if the PBP Free flag is set to <i>A</i> and the PBP Auto Add item has SKU's. Not case-sensitive. <i>Errors:</i> - Invalid Auto Add SKU: A PBP Add SKU is specified, but the PBP Auto Add item does not have SKU's. - Missing Auto Add SKU: No PBP Add SKU is specified, and the PBP Auto Add item has SKU's. The fields that are labeled <i>PMD</i> update the Promotion Discount table. This table is used only if for tiered promotions. See the Work with Promotion Discounts Screen for background.
PMD Discount Pct	numeric, 5 positions with a 2-place decimal	The percentage to discount the order when it meets the requirement for this tier but not the next. See the Percent discount field on the <i>Work with Promotion Discounts Screen</i> for a discussion. <i>Used for record type: PMD.</i> <i>Conditions:</i> Used only when the promotion type is <i>T</i> (tiered). You can specify either the PMD Discount Pct, PMD Discount Amt, or PMD Item (and PMD SKU if the item has SKU's) for each record. Optional. <i>Errors:</i> - Tier Discount Conflict: The record includes a PMD Discount Amt or PMD Item (and PMD SKU if the item has SKU's) in addition to the PMD Discount Pct. - Missing Tier Discount: The record did not include a PMD Discount Pct, PMD Discount Amt, or PMD Item (and PMD SKU if the item has SKU's).
PMD Discount Amt	numeric, 13 positions with a 2-place decimal	The amount to discount the order when it meets the requirement for this tier but not the next. See the Dollar discount field on the <i>Work with Promotion Discounts Screen</i> for a discussion. <i>Used for record type: PMD.</i> <i>Conditions:</i> Used only when the promotion type is <i>T</i> (tiered). You can specify either the PMD Discount Pct, PMD Discount Amt, or PMD Item (and PMD SKU if the item has SKU's) for each record. Optional. <i>Errors:</i> - Tier Discount Conflict: The record includes a PMD Discount Amt or PMD Item (and PMD SKU if the item has SKU's) in addition to the PMD Discount Pct. - Missing Tier Discount: The record did not include a PMD Discount Pct, PMD Discount Amt, or PMD Item (and PMD SKU if the item has SKU's).

Field	Attributes	Description
PMD Dollars	numeric, 13 positions with a 2-place decimal	The merchandise total required for the order to qualify for the tier. See the Merch amount field on the <i>Work with Promotion Discounts Screen</i> for a discussion. <i>Used for record type: PMD.</i> <i>Conditions:</i> Used only when the promotion type is <i>T</i> (tiered). Required. <i>Errors:</i> - Missing PMD Dollars: No PMD Dollars amount is specified. - Record Already Exists : There is already a Promotion Discount record for the specified promotion and merchandise total.
PMD Item	alphanumeric, 12 positions	The item to add to the order when it meets the requirement for this tier but not the next. See the Free item field on the <i>Work with Promotion Discounts Screen</i> for a discussion. <i>Used for record type: PMD.</i> <i>Conditions:</i> Used only when the promotion type is <i>T</i> (tiered). You can specify either the PMD Discount Pct, PMD Discount Amt, or PMD Item (and PMD SKU if the item has SKU's) for each record. Optional. The PMD SKU is required if this is a SKU'd item. <i>Errors:</i> - Tier Discount Conflict: The record includes a PMD Discount Pct, or PMD Discount Amt in addition to the PMD Item (and PMD SKU if the item has SKU's). - Missing Tier Discount: The record did not include a PMD Discount Pct, PMD Discount Amt, or PMD Item (and PMD SKU if the item has SKU's). - Invalid Discount Item: The item specified is invalid.
PMD SKU	alphanumeric, 14 positions	The SKU of the PMD item to add to the order. See the Free item field on the <i>Work with Promotion Discounts Screen</i> for a discussion. <i>Used for record type: PMD.</i> <i>Conditions:</i> Used only when the promotion type is <i>T</i> (tiered), and there is a PMD Item specified. You can specify either the PMD Discount Pct, PMD Discount Amt, or PMD Item (and PMD SKU if the item has SKU's) for each record. Optional. <i>Errors:</i> - Tier Discount Conflict: The record includes a PMD Discount Pct, or PMD Discount Amt in addition to the PMD Item (and PMD SKU if the item has SKU's). - Missing Tier Discount: The record did not include a PMD Discount Pct, PMD Discount Amt, or PMD Item (and PMD SKU if the item has SKU's).Invalid Discount SKU: - Invalid Discount SKU: The SKU specified is invalid; the PMD Item does not have SKU's; or there is no PMD Item specified. The following field updates the Promotion Source table. You can create one or more Promotion Source records for any promotion type. The Source Code field, used in the PRM record type, also creates a record in the Promotion Source table.

Field	Attributes	Description
PRS Source	alphanumeric, 9 positions	A source code that qualifies an order for the promotion if the source is on the order header. If you specify a source code in this field, it creates a record in the Promotion Source table. See Qualifying source for a discussion. <i>Used for record type: PRS.</i> <i>Conditions: Required.</i> <i>Errors:</i> • Invalid Source Code: The source code specified is not valid. • Missing Source: No source code is specified. • Record Already Exists: There is already a Promotion Source record for the specified promotion and source code.

 Note:

This field is not case-sensitive; however, if the source code is lower case, you will not be able to apply the promotion to an order. The error message displayed in order entry is Qualifying criteria not met for this promotion. To update the field and prevent the error from occurring after you initially create the promotion, you can select *Change* for the promotion at the [Work with Promotions Screen](#), click *OK* to advance to the [Work with Qualifying Source Codes Screen](#), and use that screen to delete and re-add the source code.

The following fields that are labeled *PRC* update the Promotion Customer table. You can create one or more Promotion Customer records for any promotion type. See the [Work with Qualifying Customer/Price Groups Screen](#) for background.

PRC Cust Num	numeric, 9 positions	A customer who is eligible for the promotion. See the <i>Work with Qualifying Customer/Price Groups Screen</i> for a discussion. <i>Used for record type: PRC.</i> <i>Conditions: Either the PRC Cust Num or the PRC Cust Group is required.</i> <i>Errors:</i> • Invalid Customer Number: The customer number specified is invalid. • Missing Customer/CPG: Neither a customer number or a customer price group is specified. • Customer/CPG Conflict: Both a customer number and a customer price group are specified.

Field	Attributes	Description
PRC Cust Group	alphanumeric, 4 positions	A customer price group that is eligible for the promotion. See the <i>Work with Qualifying Customer/Price Groups Screen</i> for a discussion. <i>Used for record type: PRC.</i> <i>Conditions:</i> Either the PRC Cust Num or the PRC Cust Group is required. <i>Errors:</i> - Invalid Customer Price Group: The customer price group specified is invalid. - Missing Customer/CPG: Neither a customer number or a customer price group is specified. - Customer/CPG Conflict: Both a customer number and a customer price group are specified. The following field updates the Promotion Item Category table. You can create one or more Promotion Item Category records for an item category promotion. See the <i>Work with Qualifying Item Categories Screen</i> for background.
PIC Item Cgy	alphanumeric, 4 positions	An item category that is eligible for the promotion. See the <i>Work with Qualifying Item Categories Screen</i> for a discussion. <i>Used for record type: PIC.</i> <i>Conditions:</i> Required. <i>Errors:</i> - Invalid Item Category: The item category code is not valid. - Missing Item Category: No item category code is specified. The following fields that are labeled <i>PIE</i> update the Promotion Item Exclusion table. You can create one or more Promotion Item Exclusion records for any promotion type. See the <i>Work with Item/Category Exclusions Screen</i> for background.
PIE Item	alphanumeric, 12 positions	An item that is ineligible for the promotion. See the <i>Work with Item/Category Exclusions Screen</i> for a discussion. <i>Used for record type: PIE.</i> <i>Conditions:</i> Either the PIE Item or the PIE Item Cgy is required. <i>Errors:</i> - Invalid Item: The item specified is invalid. - Missing Item\Item Category: Neither the PIE Item or the PIE Item Cgy is specified. - Item\Item Category Conflict: Both the PIE Item or the PIE Item Cgy are specified.
PIE Item Cgy	alphanumeric, 4 positions	An item category that is ineligible for the promotion. See the <i>Work with Item/Category Exclusions Screen</i> for a discussion. <i>Used for record type: PIC.</i> <i>Conditions:</i> Either the PIE Item or the PIE Item Cgy is required. <i>Errors:</i> - Invalid Item Category: The item category specified is not valid. - Missing Item\Item Category: Neither the PIE Item or the PIE Item Cgy is specified. - Item\Item Category Conflict: Both the PIE Item or the PIE Item Cgy are specified.

Field	Attributes	Description
The upload updates the following field if the upload record is in error.		
Error Desc	alphanumeric, 45 positions	The description of the error. See Promotion Upload Errors for a list.

Fields Used in the Promotion Upload by Record Type

In this topic:

- [Promotion Creation \(PRM\)](#)
- [Promotion Deletion](#)
- [Promotion BOGO Creation \(PRB\)](#)
- [Promotion BOGO by Price Code Creation \(PBP\)](#)
- [Promotion Discount Creation \(PMD\)](#)
- [Promotion Source Creation \(PRS\)](#)
- [Promotion Customer Creation \(PRC\)](#)
- [Promotion Item Category Creation \(PIC\)](#)
- [Promotion Item Exclusion Creation \(PIE\)](#)

Promotion Creation (PRM)

Use a [Record Type](#) of *PRM* to create or update a record in the Promotion table. See the [Create Promotion Screen](#) for background on the fields in this table.

The required and optional fields vary based on the [Promotion Type](#).

For details, see:

- [Order Promotion Fields](#)
- [Freight Promotion Fields](#)
- [Additional Freight Promotion Fields](#)
- [Item Category Promotion Fields](#)
- [Tiered Promotion Fields](#)
- [BOGO Promotion Fields](#)

Order Promotion Fields

Required fields:

- [Company](#)

- *Record Type*: PRM
- *Request Type*: A or D
- *Record Date*
- *Promotion Code*
- *Description*
- *Start Date*
- *End Date*
- *Priority*
- *Promotion Type*: O
- *PRM Dollar Discount* OR *PRM Percent Discount*

Optional fields:

- *Popup 1-4*
- *Promotion ID*
- *Qualify Amount*
- *From SCF*
- *To SCF*
- *Qualify Qty*
- *US Only*
- *Additional Charge*
- *Offer Number* OR *Source Code*
- *Pay Type*
- *Ship Via Override*
- *Override Country*
- *Required Entry*
- *First Buyer*
- *Ship Via Priority*
- *Max Qty*

Sample PRM Order promotion upload record:

```
7|PRM|A|1|1150414||PUORDER|PUORDER PROMOTION DESCRIPTION|1150401|1150601|POPUP
WINDOW MESSAGE 1|POPUP WINDOW MESSAGE 2|POPUP WINDOW MESSAGE 3|POPUP WINDOW
MESSAGE 4|1|O|PROMOID|5.95||.00|||||1||OA|WEB|4|4|US||N|O||1|.00|10|||0|
0|.00|.00|.00|||0|||.00|0|0|0|.00|.00|.00|||||.00|.00|||0|||0|.00|5.00|.00
```

Additional uploads for an order promotion: You can also upload one or more Promotion Source, Promotion Customer, and Promotion Item Exclusion records for an order promotion. See *Promotion Source Creation (PRS)*, *Promotion Customer Creation (PRC)*, and *Promotion Item Exclusion Creation (PIE)* for more information.

Freight Promotion Fields

Required fields:

- *Company*

- *Record Type*: PRM
- *Request Type*: A
- *Record Date*
- *Promotion Code*
- *Description*
- *Start Date*
- *End Date*
- *Priority*
- *Promotion Type*: F
- *Free Freight* OR *Freight Override* OR *PRM Dollar Discount* OR *PRM Percent Discount* (with *Additional Charge* required for *PRM Dollar Discount* OR *PRM Percent Discount*)

Optional fields:

- *Popup 1-4*
- *Promotion ID*
- *Qualify Amount*
- *From SCF*
- *To SCF*
- *Qualify Qty*
- *US Only*
- *Offer Number* OR *Source Code*
- *Pay Type*
- *Ship Via Override*
- *Override Country*
- *Required Entry*
- *First Buyer*
- *Ship Via Priority*
- *Max Qty*

Sample PRM Freight promotion upload record:

```
7|PRM|A|2|1150414||PUFRT|PUFRT PROMOTION DESCRIPTION|1150401|1150601|POPUP WINDOW
MESSAGE 1|POPUP WINDOW MESSAGE 2|POPUP WINDOW MESSAGE 3|POPUP WINDOW MESSAGE 4|2|
F|PROMOID|6.95|Y|.00|||||1|Y||WEB|4|4|US||N|O|1|.00|10||||0|0|.00|.00|.00|||
0|||.00|0|0|0|.00|.00|.00|||||.00|.00|||0|0|0|0|.00|.00|.00
```

Additional uploads for a freight promotion: You can also upload one or more Promotion Source or Promotion Customer records for a freight promotion. See *Promotion Source Creation (PRS)* and *Promotion Customer Creation (PRC)* for more information.

Additional Freight Promotion Fields

Required fields:

- *Company*
- *Record Type*: PRM

- *Request Type: A*
- *Record Date*
- *Promotion Code*
- *Description*
- *Start Date*
- *End Date*
- *Priority*
- *Promotion Type: A*
- *PRM Dollar Discount OR PRM Percent Discount*

Optional fields:

- *Popup 1-4*
- *Promotion ID*
- *Qualify Amount*
- *From SCF*
- *To SCF*
- *Qualify Qty*
- *US Only*
- *Offer Number OR Source Code*
- *Pay Type*
- *Ship Via Override*
- *Override Country*
- *Required Entry*
- *First Buyer*
- *Ship Via Priority*
- *Max Qty*

Sample PRM Additional Freight promotion upload record:

```
7|PRM|A|3|1150414||PUADLFR|PUADLFR PROMOTION DESCRIPTION|1150401|1150601|POPUP
WINDOW MESSAGE 1|POPUP WINDOW MESSAGE 2|POPUP WINDOW MESSAGE 3|POPUP WINDOW
MESSAGE 4|3|A|PROMOID|5.00||.00|||||1|Y|A|WEB|4|4|US|N|O||1|.00|10|||0|
0|.00|.00|.00|||0|||.00|0|0|0|.00|.00|.00|||||.00|.00|||0|||0|.00|.00|.00
```

Additional uploads for an additional freight promotion: You can also upload one or more Promotion Source or Promotion Customer records for an additional freight promotion. See *Promotion Source Creation (PRS)* and *Promotion Customer Creation (PRC)* for more information.

Item Category Promotion Fields

Required fields:

- *Company*
- *Record Type: PRM*
- *Request Type: A*

- *Record Date*
- *Promotion Code*
- *Description*
- *Start Date*
- *End Date*
- *Priority*
- *Promotion Type*: C
- *PRM Dollar Discount* OR *PRM Percent Discount* OR *Special Price*

Optional fields:

- *Popup 1-4*
- *Promotion ID*
- *Qualify Amount*
- *Qualify Qty*
- *Offer Number* OR *Source Code*
- *Pay Type*
- *Required Entry*
- *First Buyer*
- *Qualify Code*
- *Max Qty*

Sample PRM Item Category promotion upload record:

```
7|PRM|A|4|1150414||PUITMCT|PUITMCT PROMOTION DESCRIPTION|1150401|1150601|POPUP
WINDOW MESSAGE 1|POPUP WINDOW MESSAGE 2|POPUP WINDOW MESSAGE 3|POPUP WINDOW
MESSAGE 4|4|C|PROMOID|5.95||.00|||||1|||WEB|4|0|||N|O|O|1|10.00|10|||0|
0|.00|.00|.00|||0|||.00|0|0|0|.00|.00|.00|||||.00|.00|||0|||0|.00|.00|.00
```

Additional uploads for an item category promotion: An item category promotion also requires one or more Promotion Item Category records; see *Promotion Item Category Creation (PIC)* for more information.

You can also upload one or more Promotion Source or Promotion Customer records for an item category promotion. See *Promotion Source Creation (PRS)* and *Promotion Customer Creation (PRC)* for more information.

Tiered Promotion Fields

Required fields:

- *Company*
- *Record Type*: PRM
- *Request Type*: A
- *Record Date*
- *Promotion Code*
- *Description*
- *Start Date*

- [End Date](#)
- [Priority](#)
- [Promotion Type](#): *T*

Optional fields:

- [Popup 1-4](#)
- [Offer Number](#) OR [Source Code](#)
- [Pay Type](#)
- [Required Entry](#)
- [First Buyer](#)
- [Qualify Code](#)
- [Max Qty](#)

Sample PRM Tiered promotion upload record:

```
7|PRM|A|5|1150414||PUTIERD|PUTIERD PROMOTION DESCRIPTION|1150401|1150601|POPUP
WINDOW MESSAGE 1|POPUP WINDOW MESSAGE 2|POPUP WINDOW MESSAGE 3|POPUP WINDOW
MESSAGE 4|5|T|PROMOID|0|.00|||||0||||0|0|||||1|.00|0||||0|0|.00|.00|.00|||
0|||.00|0|0|0|.00|.00|.00|||||.00|.00|||||0|||||0|.00|.00|.00
```

Additional uploads for a tiered promotion: A tiered promotion also requires one or more Promotion Discount records; see *Promotion Discount Creation (PMD)* for more information.

You can also upload one or more Promotion Source, Promotion Customer, and Promotion Item Exclusion records for a tiered promotion. See *Promotion Source Creation (PRS)*, *Promotion Customer Creation (PRC)*, and *Promotion Item Exclusion Creation (PIE)* for more information.

BOGO Promotion Fields

Required fields:

- [Company](#)
- [Record Type](#): *PRM*
- [Request Type](#): *A*
- [Record Date](#)
- [Promotion Code](#)
- [Description](#)
- [Start Date](#)
- [End Date](#)
- [Priority](#)
- [Promotion Type](#): *B*

Optional fields:

- [Popup 1-4](#)
- [Offer Number](#) OR [Source Code](#)
- [Pay Type](#)
- [Required Entry](#)
- [First Buyer](#)

- [Qualify Code](#)
- [Max Qty](#)

Sample PRM BOGO promotion upload record:

```
7|PRM|A|6|1150414||PUBOGO|PUBOGO PROMOTION DESCRIPTION|1150401|1150601|POPUP
WINDOW MESSAGE 1|POPUP WINDOW MESSAGE 2|POPUP WINDOW MESSAGE 3|POPUP WINDOW
MESSAGE 4|6|B|PROMOID|0.00||.00|||||0|||WEB|4|0|||N|O||1|.00|10||||0|
0|.00|.00|.00||||0|||.00|0|0|0|.00|.00|.00|||||.00|.00||||0|||||0|.00|.00|.00
```

Additional uploads for a BOGO promotion: Depending on the setting of the *BOGO Grouping by Price Code or Category (L62)* system control value, a BOGO promotion also requires:

- one or more Promotion BOGO records if the system control value is set to *CATEGORY*; see *Promotion BOGO Creation (PRB)* for more information.
- one or more Promotion BOGO by Price Code records if the system control value is set to *PRICE CODE*; see *Promotion BOGO by Price Code Creation (PBP)* for more information.

You can also upload one or more Promotion Source, Promotion Customer, and Promotion Item Exclusion records for a tiered promotion. See *Promotion Source Creation (PRS)*, *Promotion Customer Creation (PRC)*, and *Promotion Item Exclusion Creation (PIE)* for more information.

Promotion Deletion

To delete a promotion and all its related records:

Required fields:

- [Company](#)
- [Record Type](#): PRM
- [Request Type](#): D
- [Record Date](#)
- [Promotion Code](#)

Any records for the promotion in the following tables are deleted:

- Promotion BOGO
- Promotion BOGO by Price Code
- Promotion Customer
- Promotion Discount
- Promotion Item Category
- Promotion Item Exclusion
- Promotion Source

Sample PRM Delete promotion upload record:

```
7|PRM|D|7|1150414||PUDELTE|PUDELTE PROMOTION DESCRIPTION|1150401|1150601|POPUP
WINDOW MESSAGE 1|POPUP WINDOW MESSAGE 2|POPUP WINDOW MESSAGE 3|POPUP WINDOW
MESSAGE 4|7||PROMOID|5.00||.00|||||1|Y|N|WEB|4|4|US|SOURCE7|N|O|O|1|.00|10||||0|
0|.00|.00|.00||||0|||.00|0|0|0|.00|.00|.00|||||.00|.00||||0|||||0|.00|.00|.00
```

Promotion BOGO Creation (PRB)

You can create one or more Promotion BOGO records for a BOGO promotion. The system uses this table only if the *BOGO Grouping by Price Code or Category (L62)* system control

value is set to *CATEGORY*; otherwise, the system uses the Promotion BOGO by Price Code table when evaluating and applying BOGO promotions.

See the *Work with BOGO Discount Screen (Item Category or Item)* for background on BOGO promotions that use these records.



Note:

Setting the *BOGO Grouping by Price Code or Category (L62)* system control value to *PRICE CODE* does not prevent you from creating records in the Promotion BOGO table; however you cannot advance to the *Work with BOGO Discount Screen (Item Category or Item)* with this setting, and the system does not use the Promotion BOGO records to evaluate or apply BOGO promotions.

All fields required except where indicated:

- *Company*
- *Record Type*: PRB
- *Request Type*: A
- *Record Date*
- *Promotion Code*
- *PRB Item Cgy* OR *PRB Item* (*PRB SKU* is optional)
- *PRB Required Qty*
- *PRB BOGO Qty*
- *PRB Discount Pct* OR *PRB Discount Amt* OR *PRB Spc Price*
- *PRB Free*
- *PRB Multiple Allowed* is optional

Sample PRB BOGO promotion upload record:

```
7|PRB|A|8|1150414||BOG01|PUBOGOB PROMOTION DESCRIPTION|0|0|||||0|||0.00||.00|||||
0||||0|0|||||0|.00|0||SKU|RED|1|1|5.00|.00|.00|Y|N|0|||.00|0|0|
0|.00|.00|.00|||||.00|.00|||||0|||||0|.00|.00|.00
```

Promotion BOGO by Price Code Creation (PBP)

You can create one Promotion BOGO by Price Code record for a BOGO promotion. The system uses this table only if the *BOGO Grouping by Price Code or Category (L62)* system control value is set to *PRICE CODE*; otherwise, the system uses the Promotion BOGO table when evaluating and applying BOGO promotions.

See the *BOGO Discount by Item/Price Code Screen* for background on BOGO promotions by price code.

**Note:**

Setting the *BOGO Grouping by Price Code or Category (L62)* system control value to *CATEGORY* does not prevent you from creating records in the Promotion BOGO by Price Code table; however you cannot advance to the *BOGO Discount by Item/Price Code Screen* with this setting, and the system does not use the Promotion BOGO by Price Code records to evaluate or apply BOGO promotions.

All fields required except where indicated:

- *Company*
- *Record Type*: PBP
- *Request Type*: A
- *Record Date*
- *Promotion Code*
- *PBP Price Code* OR *PBP Item* and *PBP Sku* (optional)
- *PBP Required Amount* or *PBP Required Qty*, or both
- if *PBP Free* is set to N or Y:
- *PBP BOGO Prc* and *PBP BOGO Qty*
- *PBP Discount Pct* OR *PBP Discount Amount* OR *PBP Special Price*
- if *PBP Free* is set to A:
- *PBP Auto Add* and *PBP Add SKU* (required if the PBP Auto Add item has SKU's)
- *PBP Prorate Disc*
- *PBP Multiple Allowed*
- *PBP Free*

Sample PBP BOGO by Price Code promotion upload record:

```
7|PBP|A|9|1150414||BOGO1|PUBOGOP PROMOTION DESCRIPTION|0|0|||||0|||0.00|.00|||||
0||||0|0|||||0|.00|0||||0|0|.00|.00|.00||||101|||50.00|1|101|1|5.00|.00|.00|N|Y|
N|||.00|.00|||||0|||||0|.00|.00|.00
```

Promotion Discount Creation (PMD)

You can create one or more Promotion Discount records for a tiered promotion. At least one record is required. See the *Work with Promotion Discounts Screen* for more information.

Required fields:

- *Company*
- *Record Type*: PMD
- *Request Type*: A
- *Record Date*
- *Promotion Code*
- *PMD Discount Pct* OR *PMD Discount Amt* OR *PMD Item* (and *PMD SKU* if the *PMD Item* has SKU's)
- *PMD Dollars*

Sample PMD Discount promotion upload record:

```
7|PMD|A|10|1150414||TG|TG TIER PROMOTION DESCRIPTION|0|0|||||0|||0.00||.00|||||
0||||0|0|||||0|.00|0||||0|0|.00|.00|.00|||0|||.00|0|0|0|.00|.00|.00|||||
0.00|.00|SKU|PINK|0|||||25.00|.00|.00|.00
```

Promotion Source Creation (PRS)

You can create Promotion Source records for any promotion type. See the [Work with Qualifying Source Codes Screen](#) for more information.

**Note:**

The [Source Code](#) field, used in the *PRM* record type, also creates a record in the Promotion Source table.

Required fields:

- [Company](#)
- [Record Type](#): PRS
- [Request Type](#): A
- [Record Date](#)
- [Promotion Code](#)
- [PRS Source](#)

Sample PRS Source promotion upload record:

```
7|PRS|A|11|1150414||OP|OPSORCS PROMOTION DESCRIPTION|0|0|||||0|||0.00||.00|||||
0||||0|0|||||0|.00|0||||0|0|.00|.00|.00|||0|||.00|0|0|0|.00|.00|.00|||||
0.00|.00|||SOURCE7|0|||||0|.00|.00|.00
```

Promotion Customer Creation (PRC)

You can create Promotion Customer records for any promotion type. See the [Work with Qualifying Customer/Price Groups Screen](#) for more information.

Required fields:

- [Company](#)
- [Record Type](#): PRC
- [Request Type](#): A
- [Record Date](#)
- [Promotion Code](#)
- [PRC Cust Num](#) OR [PRC Cust Group](#)

Sample PRC Customer promotion upload record:

```
7|PRC|A|12|1150414||OP|OPCUSTC PROMOTION DESCRIPTION|0|0|||||0|||0.00||.00|||||
0||||0|0|||||0|.00|0||||0|0|.00|.00|.00|||0|||.00|0|0|0|.00|.00|.00|||||
0.00|.00|||55|||||0|.00|.00|.00
```

Promotion Item Category Creation (PIC)

You can create Promotion Item Category records for item category promotions. See the *Work with Qualifying Item Categories Screen* for more information.

Required fields:

- [Company](#)
- [Record Type](#): PIC
- [Request Type](#): A
- [Record Date](#)
- [Promotion Code](#)
- [PIC Item Cgy](#)

Sample PIC Item Category promotion upload record:

```
7|PIC|A|13|1150414||ITMCATP|PUITMC PROMO DESCRIPTION|0|0|||||0|||0.00||.00|||||
0||||0|0|||||0|.00|0||||0|0|.00|.00|.00|||0|||.00|0|0|0|.00|.00|.00|||||
0.00|.00||||0||DFLT|||0|.00|.00|.00
```

Promotion Item Exclusion Creation (PIE)

You can create Promotion Item Exclusion records for any promotion type except for freight and additional freight. See the *Work with Item/Category Exclusions Screen* for background.

Required fields:

- [Company](#)
- [Record Type](#): PIE
- [Request Type](#): A
- [Record Date](#)
- [Promotion Code](#)
- [PIE Item OR PIE Item Cgy](#)

Sample PIE Item Exclusion promotion upload record:

```
7|PIE|A|14|1150414||ITMCATP|PUITMX PROMO DESCRIPTION|0|0|||||0|||0.00||.00|||||
0||||0|0|||||0|.00|0||||0|0|.00|.00|.00|||0|||.00|0|0|0|.00|.00|.00|||||
0.00|.00||||0||0||DFLT||0|.00|.00|.00
```

Promotion Upload Errors

The errors possible through the promotion upload are listed below. See the [Promotion Upload Table \(PRMUPLD\)](#) and [Fields Used in the Promotion Upload by Record Type](#) for background.

Error	Record Types	Description
Additional Charge Code Required	PRM	There is no Additional Charge specified for a freight promotion.
Auto Add Not Selected	PBP	No PBP BOGO Qty is specified, and the PBP Free flag is not set to A.

Error	Record Types	Description
BOGO Discount Conflict	PBP, PRB	<i>PBP</i> : More than one of the required discounts (<i>PBP Discount Pct</i> , <i>PBP Discount Amount</i> , or <i>PBP Special Price</i>) is specified. <i>PRB</i> : More than one of the required discounts (<i>PRB Discount Pct</i> , <i>PRB Discount Amt</i> , <i>PRB Spc Price</i> , or <i>PRB Free</i>) is specified.
Customer/CP G Conflict	PRC	Both a <i>PRC Cust Num</i> and a <i>PRC Cust Group</i> are specified.
Discount conflict	PRM	- Both <i>Free Freight</i> and <i>Freight Override</i> are specified, or no freight discount is specified, and the <i>Promotion Type</i> is <i>F</i> - More than one <i>PRM Dollar Discount</i> or <i>PRM Percent Discount</i> is specified for an additional freight order promotion - There is more than one discount (<i>PRM Dollar Discount</i>, <i>PRM Percent Discount</i>, or <i>Special Price</i>) specified for an item category promotion
Discount required	PRM	No <i>PRM Dollar Discount</i> or <i>PRM Percent Discount</i> is specified for an additional freight, item category, or order promotion.
Duplicate Promotion Code	PRM	The <i>Promotion Code</i> specified already exists.
Either Source code or offer	PRM, PRS	<i>PRM</i>: Both the <i>Offer Number</i> and <i>Source Code</i> were specified. <i>PRS</i>: the promotion already specifies a qualifying offer.
Fields Not In Use	PRM	A <i>Discount Receipt</i> or <i>Customer Pct Discount</i> is specified.
Invalid Add'l Chg Code	PRM	The <i>Additional Charge</i> code specified does not exist.
Invalid Allow Multiples Value	PBP	The <i>PBP Multiple Allowed</i> flag is not set to <i>Y</i> or <i>N</i> .
Invalid Auto Add SKU	PBP	A <i>PBP Add SKU</i> is specified, but the <i>PBP Auto Add</i> item does not have SKU's.
Invalid BOGO Price Code	PBP	The <i>PBP BOGO Prc</i> specified is not valid.
Invalid Company	any	The <i>Company</i> specified is not valid.

 Note:

When the company, is invalid, the record is not listed on the *Promotion Upload Error Records Report*.

Error	Record Types	Description
Invalid Continental USA Only Flag	PRM	The <i>US Only</i> flag is not set to Y or N for a freight or additional freight promotion (the Promotion Type is A or F). This field is case-sensitive, so a lowercase entry causes an error.
Invalid Customer Number	PRC	The <i>PRC Cust Num</i> specified is invalid.
Invalid Date	any	No <i>Record Date</i> is specified.
Invalid Discount Item	PMD	The <i>PMD Item</i> specified is invalid.
Invalid End Date	PRM	There is no end date specified; or the <i>End Date</i> is earlier than the <i>Start Date</i> ; or the date specified is not valid.
Invalid First Time Buyer	PRM	The <i>First Buyer</i> setting is not O or S. This field is case-sensitive, so a lowercase entry causes an error.
Invalid From SCF	PRM	- The <i>From SCF</i> or <i>To SCF</i> is not valid for the country (either the Override Country, if specified, otherwise, for the <i>Default Country for Customer Address (B17)</i>) - The SCF range is not valid, and the country matches the <i>Default Country for Customer Address (B17)</i>
Invalid Item	PBP, PIE, or PRB	The <i>PBP Item</i> , <i>PIE Item</i> , or <i>PRB Item</i> specified is invalid.
Invalid Item Category	PIC or PRB	The <i>PIC Item Cgy</i> or <i>PRB Item Cgy</i> is not valid.
Invalid Multiple Allowed	PRB	The <i>PRB Multiple Allowed</i> setting was not N, Y, or blank.
Invalid Offer	PRM	The <i>Offer Number</i> specified is not valid.
Invalid Pay Type	PRM	The <i>Pay Type</i> specified is not valid.
	PBP	The <i>PBP Price Code</i> specified is invalid.
Invalid Priority	PRM	The <i>Priority</i> is 0.
Invalid Promotion Code	any except PRM	The <i>Promotion Code</i> specified is invalid.
Invalid Promotion Type	PRM	The promotion type specified is not one of the values listed under <i>Promotion Type</i> . The promotion type is case-sensitive, so lowercase entries are invalid.

Error	Record Types	Description
Invalid Qualifier for Tier Promotion	PRM	There is a <i>Qualify Amount</i> specified and the <i>Promotion Type</i> is T.
Invalid Request Type	any	The <i>Request Type</i> is D and the <i>Record Type</i> is PRS, PIC, PRC, PMD; or the Request Type specified is not A or D. The request type is case-sensitive.
Invalid Ship Via Override	PRM	The <i>Ship Via Override</i> specified is not valid.
Invalid Ship Via Override Country	PRM	The <i>Override Country</i> specified is not valid.
Invalid SKU	PBP or PRB	<i>PBP</i> : The <i>PBP Item</i> is not a SKU'd item, but a <i>PBP Sku</i> is specified; or the <i>PBP Sku</i> specified is not valid for the <i>PBP Item</i> . <i>PRB</i> : The <i>PRB SKU</i> is invalid, or specified for a non-SKU'd <i>PRB Item</i> .
Invalid Source Code	PRM or PRS	<i>PRM</i> : The <i>Source Code</i> specified is not valid. <i>PRS</i> : The <i>PRS Source</i> specified is not valid.
Invalid Start Date	PRM	There is no <i>Start Date</i> specified, or the date specified is not valid.
Item Cat or Item as Qualifier	PRB	Both <i>PRB Item Cgy</i> and the <i>PRB Item</i> are specified.
Item Category Not Valid for Auto Add	PRB	The <i>PRB Free</i> field is set to A, and <i>PRB Item Cgy</i> is specified as a qualifier.
Item\Item Category Conflict	PIE	Both the <i>PIE Item</i> or the <i>PIE Item Cgy</i> are specified.
Missing Auto Add SKU	PBP	No <i>PBP Add SKU</i> is specified, and the <i>PBP Auto Add</i> item has SKU's.
Missing Bogo Discount	PBP	None of the required discounts (<i>PBP Discount Pct</i> , <i>PBP Discount Amount</i> , or the <i>PBP Special Price</i>) is specified; or, the <i>PBP Free</i> field is set to N, but a <i>PBP Auto Add</i> item is specified.
Missing BOGO Qty	PRB	No <i>PRB BOGO Qty</i> is specified.
Missing Bogo Qualifier	PBP	No <i>PBP Required Qty</i> or <i>PBP Required Amount</i> is specified.

Error	Record Types	Description
Missing Customer/CPG	PRC	Neither a <i>PRC Cust Num</i> or a <i>PRC Cust Group</i> is specified.
Missing Description	PRM	There is no <i>Description</i> specified.
Missing Item	PBP or PRB	<i>PBP</i> : There is a <i>PBP Sku</i> specified but no <i>PBP Item</i> . <i>PRB</i> : A <i>PRB SKU</i> is specified, but not a <i>PRB Item</i> .
Missing Item Category	PIC	No <i>PIC Item Cgy</i> is specified.
Missing Item\Item Category	PIE	Neither the <i>PIE Item</i> or the <i>PIE Item Cgy</i> is specified.
Missing Item or Item Cat	PRB	Neither the <i>PRB Item Cgy</i> or the <i>PRB Item</i> are specified.
Missing PMD Dollars	PMD	No <i>PMD Dollars</i> amount is specified.
Missing Promotion Code	any	The <i>Promotion Code</i> is blank.

Note:

If the promotion code is blank for a delete request (the Request Type is *D*), the upload record is flagged as an error, but the Error Desc remains blank.

Missing Required Qty	PRB	No <i>PRB Required Qty</i> is specified.
Missing Source	PRS	No <i>PRS Source</i> is specified.
Missing Tier Discount	PMD	The record did not include one of the following: <i>PMD Discount Pct</i> , <i>PMD Discount Amt</i> , or <i>PMD Item</i> (and <i>PMD SKU</i> if the item has SKU's).
Only Valid for Freight Promotion	PRM	<i>Free Freight</i> is specified, but the <i>Promotion Type</i> is not <i>F</i> .
Override Option Not Valid for Promo Type:	PRM	A <i>Ship Via Override</i> is specified, and the promotion type is not <i>A</i> , <i>F</i> , or <i>O</i> (additional freight, freight, or order).

Error	Record Types	Description
Price Code or Item as Benefit	PBP	The PBP Free field is set to A (auto-add), but there is also a PBP BOGO Qty specified; or there is no PBP Auto Add item specified; or the PBP Add SKU is not a valid SKU for the PBP Auto Add item.
	PBP	Both the PBP Price Code and the PBP Item are specified; or neither is specified; or a PBP BOGO Prc is specified and the PBP Free flag is set to A.
Prorate Discount Invalid	PBP	The PBP Prorate Disc flag is not set to Y or N.
Promotion Type Conflict	any except PRM	- The Promotion Code specified for a PIC Record Type is not an item category promotion. - The Promotion Code specified for a PMD Record Type is not a tiered promotion. - The Promotion Code specified for a PRB or PBP Record Type is not a BOGO promotion.
Promotion/Record Type Mismatch	PIE	The Promotion Code specified for a PIE Record Type is a freight or additional freight promotion.
Qualifier Not Valid for Free Freight	PRM	The Free Freight field was not set to Y, N, or blank for a freight promotion. The field is case-sensitive, so lowercase values are invalid.
Qualifier Not Valid For Promo Type	PRM	- There is a Qualify Amount specified and the Promotion Type is B. - Either Free Freight and Freight Override is specified, and the Promotion Type is not F. - A Freight Override is specified and the Promotion Type is not F. - An Additional Charge code is specified and the Promotion Type is not A, F, or O (additional freight, freight, or order). - A Qualify Code is specified but this is not an item category promotion. - A Qualify Code is not set to O or I. The record type is case-sensitive, so lowercase entries are invalid.
Qualifier Not Valid for Promotion Type	PRM	- A From SCF or To SCF is specified for a BOGO, tiered, or item category promotion (the Promotion Type is B, T, or C). - the SCF range in the From SCF to To SCF is not valid, and the country does not match the <i>Default Country for Customer Address (B17)</i> - The US Only flag is populated for promotion that is not an additional freight or freight promotion (Promotion Type of A or F). - A Qualify Qty is specified for a BOGO or tiered promotion (the Promotion Type is B or T)
Qualify Code required	PRM	No Qualify Code is specified, but there is a Qualifying \$ amount type specified for an item category promotion.

Error	Record Types	Description
Record Already Exists	PIE, PRB, PRS, PMD	- The Request Type is <i>D</i>, and the Record Type is <i>PIE</i> or <i>PRB</i>. - The Record Type is <i>PRS</i>, and the Promotion Source record already exists. - The Record Type is <i>PMD</i>, and the Promotion Discount record already exists. In this situation, a duplicate is identified by the PMD Dollars.
Record type not found	N/A	The record type does not match one of the values listed under Record Type . The record type is case-sensitive, so lowercase entries are invalid.
Required Field For This Type	PBP	The PBP Free field is not set to <i>A</i> , <i>N</i> , or <i>Y</i> .
Required for Record Type	PRB	This PRB Free field is not set to <i>N</i> , <i>Y</i> , or <i>A</i> .
Ship Via Override Required	PRM	The upload record specifies an Override Country but no Ship via override .
Special Price Not Valid	PRM	A Special Price is specified even though the promotion type is not <i>C</i> .
Tier Discount Conflict	PMD	The record includes more than one of the following: PMD Discount Pct , PMD Discount Amt , or PMD Item (and PMD SKU if the item has SKU's).

Setting Up Pricing Information

Topics in this part: The following topics describe how to set up and change pricing information:

- [Understanding Promotional Pricing](#) provides an overview of promotional pricing and the basic information you need to set up pricing information on the system.
- [Work with Promotional Pricing Groups \(WPRG\)](#) describes how to create and change a promotional pricing group.
- [Work with Promotional Pricing \(WPRP\)](#) describes how to create and change a promotional pricing record. This record establishes the eligibility requirements and the incentives available in promotional pricing.
- [Working with Price Codes \(WPCD\)](#) describes how to create price codes that you can assign to various items, so that you can offer your customers special price breaks when they order a sufficient combined quantity of these items.
- [Assigning Price Codes \(APCD\)](#) describes how to assign price codes to items based on source code or offer.
- [Price Code Upload](#) describes how to upload price code information from an external system to create, update, or delete records in the Price Code, Price Code Customer, and Price Code Details tables.

- [Display Price Code Assignments \(DPCA\)](#) allows you to review the items/SKUs assigned to a price code by offer or source code and the requirements that must be met for an order to be eligible for the price code.
- [Working with Price Tables \(WPTB\)](#) describes how price table pricing works and how to create and maintain price tables from items and groups of items.
- [Package Insert Processing \(WPIP\)](#) describes how to create package insert/promotional items that will be automatically added to an order in Order Entry/Maintenance.
- [Working with Coupon Promotions \(WCPR\)](#) describes how to set up coupons for percentage or dollar discounts on an order, or for selected item(s), and provides an overview of how coupon discounts work.
- [Working with Customer Price Groups \(WCPG\)](#) describes how to create and work with customer price groups used during quantity price matrix pricing, customer price group pricing, and as a qualifier for a discount promotion.
- [Customer Price Group SKU Exclusion Upload](#) describes how to upload customer price group SKU exclusion information from an external system to create or update records in the Customer Price Group SKU Exclusion table.
- [Customer Price Group Pricing](#) provides an overview of the customer price group pricing method, required setup, and processing details.
- [Working with Quantity Price Matrix \(WQPM\)](#) describes how to create and work with the quantity price matrix pricing method.
- [Pricing Upload Interface](#) describes how to upload source discount and quantity price matrix pricing from an external system.

Understanding Promotional Pricing

Purpose: This topic discusses promotional pricing and what you need to do to set up both features.

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

You can also create promotions based on the day of the week, which you can review in Order Entry by selecting *Dsp Daily Promo* at the Select Customer Sold To for Order screen. However, you cannot offer these “daily specials” if you use tax-inclusive pricing, as there is no way to determine if the order is subject to VAT and tax-inclusive pricing before you enter the header information on an order. See the Tax Included in Price (E70) system control value.

Promotional pricing windows display only if the order type indicates to display promo windows. Typically, you would not want them to display for fax or mail orders.

Promotional Pricing

Initial steps: Use the following steps to set up promotional pricing (see *Understanding Promotional Pricing*).

- Create the offer or source codes for which promotional pricing will be valid (as described in [Introducing Offer and Source Codes](#)). The Promo pricing field for the source code must be *selected*. In addition, to receive promotional pricing for the specified offer/source code, make sure you create item/SKU offer prices for the items/SKUs assigned to the offer (associated with the source code).

- Use [Establishing Order Types \(WOTY\)](#) to indicate the order types subject to promotional pricing. (For example, you might not want promotional pricing pop-up windows to appear for mail or fax orders.) The Promo windows field in the order type record must be set to *Promo* (promotional pricing).

Promotional group setup: If you are using promotional groups, or if you want to offer a group of items as an incentive, you need to set up promotional groups before you can create a promotional pricing record.

- Select [Work with Promotional Pricing Groups \(WPRG\)](#) to create a promotional group, and assign the items the customer must order to receive the incentive.
- If you want the customer to select an incentive item from a group of items, you also use this function to set up your incentive groups.

Promotion pricing setup: Select [Work with Promotional Pricing \(WPRP\)](#) to define the requirements that will make the customer eligible for the incentive group or incentive item, what the incentive group or item will be, the maximum quantity, and whether it is offered at no charge, a special incentive price, or a discounted price.

Promotional pricing in Order Entry: You advance to a promotional pricing pop-up window or screen only when:

- The customer places an order from a source code or offer for which a promotion has been defined and
- The customer orders:
 - a specific quantity from a predefined group
 - a specific quantity of an item
 - a certain dollar amount of merchandise, and
- The [Promo pricing \(Promotional pricing\)](#) field in the source code record is *selected*, and
- The Promo windows field in the order type record is set to *Promo* (promotional pricing)



Note:

Once you have added an incentive item to an order, the system will not reprice it or reassess tax, regardless of changes to the shipping address, customer tax status, etc.

Regular Price Code Pricing

If the [Price Codes \(D93\)](#) system control value is selected, the system applies price code discounts to an order during repricing and end-of-order pricing.

See [When Repricing Occurs](#) for more information on when repricing occurs during interactive order entry.

Source code setting: To apply price code discounting to an order, the Price method field for the source code on the order header must be set to *Reg Plus Reprice*.

**Note:**

If the *Customer Price Group Code for CPG Pricing Only (L58)* system control value contains a customer price group code, the system performs *Customer Price Group Price Code Pricing* instead of Regular Price Code Pricing.

The system performs the following steps during regular price code pricing.

- *Determine Whether the Order Qualifies for a Price Code*
- *Apply the Price Code to the Order*
- *Apply Discounts and Promotions to the Order*

Determine Whether the Order Qualifies for a Price Code

To qualify for a price code:

#	Step

1.	The date on the Order Header must fall within the Start date and End date defined for the price code in the Price Code table. You can review the start and end dates for price codes on the <i>Work with Price Codes Screen</i> .
2.	The sold to customer on the order must be defined for the price code in the Price Code Customer table. You can review the customers and customer price groups that qualify for a price code on the <i>Work with Qualifying Customer/Price Groups Screen</i> .

**Note:**

If you do not define any sold to customers or customer price groups for a price code, then ALL sold to customers and customer price groups qualify for the price code.

3.	The items on the order must be assigned to the price code and meet the price code requirements.

Which items are assigned to the price code? The system looks at the Price Code Details table to determine which items on the order are assigned to the price code. When assigning an item to a price code, you assign the item to the price code by offer or source code. The system uses the source code on the order header to determine whether the item on the order qualifies for the price code.

- If the item contains SKUs and a SKU is not defined in the Price Code Details table, all SKUs for the item qualify for the price code.
- If the item contains SKUs and a SKU is defined in the Price Code Details table, only the specified SKUs qualify for the price code.

#	Step
	Price code requirements: The system looks at the Price Code table to determine if the items on the order that are assigned to the price code meet the price code requirements. <i>Quantity required:</i> The total quantity the customer must order of all qualifying items to get the price break. Note: The system evaluates price code quantity by ship-to address. <i>Allow multiples?</i> • <i>Unselected</i> = Once an order qualifies for the price code based on the price code quantity requirement, the system applies the price code discount to all qualifying items on the order that are not already assigned to a price code. • <i>Selected</i> = Once an order qualifies for the price code based on the price code quantity requirement, the remaining items on the order that are not already assigned to a price code must meet the price code quantity requirement again in order to qualify for the price code. The Distinct By setting defines how the system determines whether the order meets the price code multiple requirement: <i>Distinct By:</i> • <i>Blank</i> = The order must meet the price code quantity requirement again in order to qualify. <i>Example:</i> If the Quantity required is 3, the order must contain three items/ SKUs defined for the price code in order to qualify. If the order contains 7 items that qualify, the system applies the price code to 6 of the items. • <i>Item</i> = The quantity requirement for the price code requires separate <i>items</i> in order to qualify. <i>Example:</i> If the Quantity required is 3, the order must contain three separate items defined for the price code in order to qualify. • <i>SKU</i> = The quantity requirement for the price code requires separate <i>SKUs</i> in order to qualify. <i>Example:</i> If the Quantity required is 3, the order must contain three separate SKUs defined for the price code in order to qualify. • <i>Category</i> = The quantity requirement for the price code requires separate <i>item categories</i> in order to qualify. <i>Example:</i> If the Quantity required is 3, the order must contain three separate item categories for the items defined for the price code in order to qualify. See Regular Price Code Pricing Examples for examples of how price codes are applied to an order based on the price code requirements.

Apply the Price Code to the Order

You can apply only one price code to an order line.

Price code hierarchy: If an order line qualifies for more than one price code and you are using *Regular Price Code Pricing*, the system uses the Sequence number assigned to each price code to determine the order in which to apply price codes to an order.

- Use the price code with the lowest sequence number.
- If more than one price code has the same sequence number, use the price code with the lowest numeric price code.

Once you apply a price code to an order line, it no longer qualifies for another price code.

After you apply the first price code to the order, the system reevaluates the order to determine if it qualifies for another price code. The system continues to apply price codes to the order, using the price code hierarchy, until all of the eligible lines on the order are assigned to a price code.

Applying a price code to a portion of an order line: To easily determine the price code discount applied to the lines on an order, enter each order line for a quantity of 1. If an order line contains a quantity greater than 1 and only part of the quantity on the order line qualifies for the discount, the system applies the discount to the quantity that qualifies for the discount and leaves the remaining quantity on the order line at its initial price. The extended price of the order line represents the discounted quantity price + the non-discounted quantity price.

Partial price code line example: An order line qualifies for a price code discount: \$3.00 off 2. The Multiples field is selected for the price code, indicating the order must meet the price code requirement again to apply the price code to the order multiple times. The order line quantity is 3 with a unit price of 10.00. The system applies the price code discount to 2 units of the item ($10.00 - 3.00 = 7.00$). The third unit remains priced at 10.00. The extended price for the order line is 24.00 ($7.00 + 7.00 + 10.00$) and the unit price for the order line is 8.00 ($24.00 / 3$).



Note:

There may be a rounding discrepancy if the extended price of an order line does not divide evenly by the order quantity. This discrepancy should be no more than a few pennies. *Example:* Change the discount in the example above from \$3.00 off 2 to \$2.00 off 2. The order line quantity is 3 with a unit price of 10.00. The system applies the price code discount to 2 units of the item ($10.00 - 2.00 = 8.00$). The third unit remains priced at 10.00. The extended price for the order line is 26.01 and the unit price is 8.67 ($26.00 / 3 = 8.666$, which rounds to 8.67; $8.67 + 8.67 + 8.67 = 26.01$).

Price method: The system updates the Price method for any order line whose price was updated during price code pricing to *E Price Code*.

Note:

- Price code repricing does not apply to manually priced order lines associated with a price override reason code.
- When calculating the price code discount, the system uses the price defined in the ODT Price field for the order line.

Apply Discounts and Promotions to the Order

After applying a price code to the lines on the order, the system applies any additional discounts to the order, such as a discount percentage defined for the source code or Order Header, free gifts based on offer or source code, additional charge dollar discounts based on the offer or source code, or package inserts.

For more information: See *Regular Price Code Pricing Examples* for examples of how the system applies each type of price code discount to an order.

Regular Price Code Pricing Examples

1. [Example: Price Code Special Price Discount](#)
2. [Example: Price Code Dollar Off Discount](#)
3. [Example: Price Code Percent Off Discount](#)
4. [Example: Price Code Group Price Discount](#)
5. [Example: Applying Multiple Price Codes to the Order](#)
6. [Example: Item Qualifies for More than One Price Code](#)

Example: Price Code Special Price Discount

On 2/17/12, you take an order for sold to customer 10 using source code 7.

Line#	Item	Quantity	Price
1	A1	1	\$10.00

Line#	Item	Quantity	Price
2	B1	2	\$20.00
3	C1	3	\$30.00
4	D1	4	\$40.00

Determine eligible price codes: The date on the Order Header falls within the date range for the following price codes in the Price Code table:

Price Code	Seq	Start	End	Qty	Type of Price Code Discount
101	4	2/1/12	4/1/12	1	<i>Dollar off: \$2 off 1</i>
202	3	2/1/12	4/1/12	2	<i>Percent off: 10% off 2</i>
303	2	2/1/12	4/1/12	3	<i>Special price: \$20.00 each for 3</i>
404	1	2/1/12	4/1/12	3	<i>Group price: \$60.00 total for 3</i>

Determine price code customer assignment: The sold to customer on the order qualifies for the following price code in the Price Code Customer table:

Price Code	Customer#
303	10

Determine price code item assignment: The item on the order that qualifies for price code 303 in the Price Code Details table is:

Price Code	Item	SKU	Source Code
303	C1		7

Reprice the order: When you select *Reprice* at the Order Detail screen, the system reprices as follows:

Line#	Item	Initial Price	Price Code	Reprice
1	A1	\$10.00	none	Price remains \$10.00
2	B1	\$20.00	none	Price remains \$20.00
3	C1	\$30.00	303	Special price: \$20.00 each for 3 Price changes from \$30.00 to \$20.00
4	D1	\$40.00	none	Price remains \$40.00

Because the calculated order line price for item C1 is lower than the initial price of the item, the system displays [Discount Calculation Messages](#) when you reprice the order: Line 3: Offer = 30.00 Actual = 20.00 Discount = 10.00 :33.33%

Example: Price Code Dollar Off Discount

On 2/17/12, you take an order for sold to customer 10 and source code 7.

Line#	Item	Quantity	Price
1	A1	1	\$10.00
2	B1	2	\$20.00
3	C1	3	\$30.00
4	D1	4	\$40.00

Determine eligible price codes: The date on the Order Header falls within the date range for the following price codes in the Price Code table:

Price Code	Seq	Start	End	Qty	Type of Price Code Discount
101	4	2/1/12	4/1/12	1	<i>Dollar off: \$2 off 1</i>
202	3	2/1/12	4/1/12	2	<i>Percent off: 10% off 2</i>
303	2	2/1/12	4/1/12	3	<i>Special price: \$20.00 each for 3</i>
404	1	2/1/12	4/1/12	3	<i>Group price: \$60.00 total for 3</i>

Determine price code customer assignment: The sold to customer on the order qualifies for the following price code in the Price Code Customer table:

Price Code	Customer#
101	10

Determine price code item assignment: The item on the order that qualifies for price code 101 in the Price Code Details table is:

Price Code	Item	SKU	Source Code
101	A1		7

Reprice the order: When you select *Reprice* at the Order Detail screen, the system reprices as follows:

Line#	Item	Initial Price	Price Code	Reprice
1	A1	\$10.00	101	Dollar off: \$2.00 off 1 Price changes from \$10.00 to \$8.00
2	B1	\$20.00	none	Price remains \$20.00
3	C1	\$30.00	none	Price remains \$30.00
4	D1	\$40.00	none	Price remains \$40.00

Because the calculated order line price for item A1 is lower than the initial price of the item, the system displays *Discount Calculation Messages* when you reprice the order: Line 1: Offer = 10.00 Actual = 8.00 Discount = 2.00 :20.00%

Example: Price Code Percent Off Discount

On 2/17/12, you take an order for sold to customer 10 and source code 7.

Line#	Item	Quantity	Price
1	A1	1	\$10.00
2	B1	2	\$20.00
3	C1	3	\$30.00
4	D1	4	\$40.00

Determine eligible price codes: The date on the Order Header falls within the date range for the following price codes in the Price Code table:

Price Code	Seq	Start	End	Qty	Type of Price Code Discount
101	4	2/1/12	4/1/12	1	<i>Dollar off:</i> \$2 off 1
202	3	2/1/12	4/1/12	2	<i>Percent off:</i> 10% off 2
303	2	2/1/12	4/1/12	3	<i>Special price:</i> \$20.00 each for 3
404	1	2/1/12	4/1/12	3	<i>Group price:</i> \$60.00 total for 3

Determine price code customer assignment: The sold to customer on the order qualifies for the following price code in the Price Code Customer table:

Price Code	Customer#	Customer Price Group
202	10	

Determine price code item assignment: The item on the order that qualifies for price code 202 in the Price Code Details table is:

Price Code	Item	SKU	Source Code
202	B1		7

Reprice the order: When you select *Reprice* at the Order Detail screen, the system reprices as follows:

Line#	Item	Initial Price	Price Code	Reprice
1	A1	\$10.00	none	Price remains \$10.00
2	B1	\$20.00	202	Percent off: 10% off 2 Price changes from \$20.00 to 18.00
3	C1	\$30.00	none	Price remains \$30.00
4	D1	\$40.00	none	Price remains \$40.00

Because the calculated order line price for item A1 is lower than the initial price of the item, the system displays *Discount Calculation Messages* when you reprice the order: Line 2: Offer = 20.00 Actual = 18.00 Discount = 2.00 :10.00%

Example: Price Code Group Price Discount

On 2/17/12, you take an order for sold to customer 10 and source code 7.

Line#	Item	SKU	Quantity	Price
1	SKA	RED	1	\$40.00
2	SKB	BLUE	1	\$20.00
3	SKC	GRN	1	\$30.00
4	SKD	GREY	1	\$40.00

Determine eligible price codes: The date on the Order Header falls within the date range for the following price codes in the Price Code table:

Price Code	Seq	Start	End	Qty	Type of Price Code Discount
101	4	2/1/12	4/1/12	1	<i>Dollar off:</i> \$2 off 1
202	3	2/1/12	4/1/12	2	<i>Percent off:</i> 10% off 2
303	2	2/1/12	4/1/12	3	<i>Special price:</i> \$20.00 each for 3
404	1	2/1/12	4/1/12	3	<i>Group price:</i> \$60.00 total for 3

Determine price code customer assignment: The sold to customer on the order qualifies for the following price code in the Price Code Customer table:

Price Code	Customer#	Customer Price Group
404	10	

Determine price code item assignment: The items on the order that qualify for price code 404 in the Price Code Details table are:

Price Code	Item	SKU	Source Code
404	SKA		7
404	SKB		7
404	SKC		7
404	SKD		7



Note:

If an item contains SKUs and no SKUs are defined for the item in the Price Code Details table, all SKUs for the item qualify for the price code.

Reprice the order: When you select *Reprice* at the Order Detail screen, the system reprices as follows:

Line#	Item	SKU	Initial Price	Price Code	Reprice
2	SKB	BLUE	\$20.00	404	Group price: \$60.00 total for 3 Price changes from \$20.00 to \$13.33
3	SKC	GRN	\$30.00	404	Group price: \$60.00 total for 3 Price changes from \$30.00 to \$20.00
1	SKA	RED	\$40.00	404	Group price: \$60.00 total for 3 Price changes from \$40.00 to \$26.67
4	SKD	GREY	\$40.00	none	Price remains \$40.00

Results:

- merchandise total for lines assigned to price code 404 = \$90.00
- \$90.00 merchandise total - \$60.00 group price = \$30.00 discount amount to prorate

**Note:**

Order line 4 does not qualify for the price code 404 discount because you must order the qualifying items in groups of 3. If the customer ordered 2 more qualifying items, the order would qualify for the price code 404 discount two times because it would have two qualifying groups of 3 on the order.

Prorating the Group Price

The system applies the group price discount to each qualifying order line on a pro-rata basis.

Order line 2 calculations:

20.00 extended amount of the detail line before applying discounts / 90.00
discountable order merchandise total = .2222 discount percentage

20.00 pre-discount unit price of the detail line - [(30.00 total discount amount
to prorate * .2222 discount percentage from above calculation) / 1 line unit
quantity] = 13.33 unit selling price

Order line 3:

30.00 extended amount of the detail line before applying discounts / 90.00
discountable order merchandise total = .3333 discount percentage

30.00 pre-discount unit price of the detail line - [(30.00 total discount amount
to prorate * .3333 discount percentage from above calculation) / 1 line unit
quantity] = 20.00 unit selling price

Order line 1:

40.00 extended amount of the detail line before applying discounts / 90.00
discountable order merchandise total = .4444 discount percentage

40.00 pre-discount unit price of the detail line - [(30.00 total discount amount
to prorate * .4444 discount percentage from above calculation) / 1 line unit
quantity] = 26.67 unit selling price

Discount message: Because the calculated order line price for lines 1-3 is lower than the initial price of the item, the system displays *Discount Calculation Messages* when you reprice the order: Line 3: Offer = 30.00 Actual = 20.00 Discount = 10.00 :33.33%

Example: Applying Multiple Price Codes to the Order

On 2/17/12, you take an order for sold to customer 10 and source code 7.

Line#	Item	Quantity	Price
1	A1	1	\$10.00
2	B1	2	\$20.00
3	C1	3	\$30.00
4	D1	3	\$40.00

Determine eligible price codes: The date on the Order Header falls within the date range for the following price codes in the Price Code table:

Price Code	Seq	Start	End	Qty	Type of Price Code Discount
101	4	2/1/12	4/1/12	1	<i>Dollar off:</i> \$2 off 1
202	3	2/1/12	4/1/12	2	<i>Percent off:</i> 10% off 2
303	2	2/1/12	4/1/12	3	<i>Special price:</i> \$20.00 each for 3
404	1	2/1/12	4/1/12	3	<i>Group price:</i> \$60.00 total for 3

Determine price code customer assignment: The sold to customer on the order qualifies for the following price codes in the Price Code Customer table:

Price Code	Customer#	Customer Price Group
101	10	
202	10	
303	10	
404	10	

Determine price code item assignment: The details in the Price Code Details table for the items on the order are:

Price Code	Item	SKU	Source Code
101	A1		7
202	B1		7
303	C1		7
404	D1		7

Reprice the order: When you select *Reprice* at the Order Detail screen, the system reprices as follows:

Line#	Item	Initial Price	Price Code	Reprice
1	A1	\$10.00	101	Dollar off: \$2 off 1 Price changes from \$10.00 to \$8.00
2	B1	\$20.00	202	Percent off: 10% off 2 Price changes from \$20.00 to 18.00
3	C1	\$30.00	303	Special price: \$20.00 each for 3 Price changes from \$30.00 to \$20.00
4	D1	\$40.00	404	Group price: \$60.00 total for 3 Price changes from \$40.00 to \$20.00

Example: Item Qualifies for More than One Price Code

On 2/17/12, you take an order for sold to customer 10 and source code 7.

Line#	Item	SKU	Quantity	Price
1	POLO	RED	1	\$40.00
2	POLO	BLUE	1	\$40.00
3	POLO	GRN	1	\$40.00
4	POLO	GREY	1	\$40.00
5	POLO	BLCK	1	\$40.00

Determine eligible price codes: The date on the Order Header falls within the date range for the following price codes in the Price Code table:

Price Code	Seq	Start	End	Qty	Type of Discount
101	4	2/1/12	4/1/12	1	<i>Dollar off: \$2 off 1</i>
202	3	2/1/12	4/1/12	2	<i>Percent off: 10% off 2</i>
303	2	2/1/12	4/1/12	3	<i>Special price: \$20.00 each for 3</i>
404	1	2/1/12	4/1/12	3	<i>Group price: \$60.00 total for 3</i>

Determine price code customer assignment: The sold to customer on the order qualifies for the following price codes in the Price Code Customer table:

Price Code	Customer#	Customer Price Group
101	10	
202	10	
303	10	
404	10	

Determine price code item assignment: The details in the Price Code Details table for the items on the order are:

Price Code	Item	SKU	Source Code
101	POLO		7

Price Code	Item	SKU	Source Code
202	POLO		7
303	POLO		7
404	POLO		7

**Note:**

If an item contains SKUs and no SKUs are defined for the item in the Price Code Details table, all SKUs for the item qualify for the price code.

**Important:**

You can apply only one price code to an order line. If an order line qualifies for more than one price code and you are using *Regular Price Code Pricing*, the system uses the Sequence number assigned to each price code to determine the order in which to apply price codes to an order.

Reprice the order: When you select *Reprice* at the Order Detail screen, the system reprices as follows:

Line#	Item	SKU	Initial Price	Price Code	Reprice
1	POLO	RED	\$40.00	404	Group price: \$60.00 total for 3 Price changes from \$40.00 to \$20.00
2	POLO	BLUE	\$40.00	404	Group price: \$60.00 total for 3 Price changes from \$40.00 to \$20.00
3	POLO	GRN	\$40.00	404	Group price: \$60.00 total for 3 Price changes from \$40.00 to \$20.00
4	POLO	GREY	\$40.00	202	Percent off: 10% off 2 Price changes from \$40.00 to 36.00
5	POLO	BLCK	\$40.00	202	Percent off: 10% off 2 Price changes from \$40.00 to 36.00

**Note:**

Of the price codes that were eligible to apply to the order, price code 404 was assigned the lowest sequence number. The next lowest sequence number was assigned to price code 303; however, the quantity required for price code 303 was 3 and only two units of the qualifying items remained on the order that were not assigned a price code. Because of this, the system assigned the next price code with the lowest sequence number (price code 202) to the two remaining items on the order.

Example: Price Code Multiples and Distinct By

On 2/17/12, you take an order for sold to customer 10 and source code 7.

Line#	Item	SKU	Item Category	Quantity	Price
1	SKA	SML	A	1	\$10.00
2	SKA	SML	A	1	\$10.00
3	SKB	SML	B	1	\$10.00
4	SKC	SML	C	1	\$10.00
5	SKD	SML	D	1	\$10.00
6	SKD	MED	D	1	\$10.00
7	SKD	LRG	D	1	\$10.00

Determine eligible price codes: The order and customer qualify for price code 202 in the Price Code table:

Price Code	Seq	Start	End	Qty	Price Code Discount
202	3	2/1/12	4/1/12	2	Percent off: 10% off 2

Determine price code item assignment: The details in the Price Code Details table for the items on the order are:

Price Code	Item	SKU	Source Code
202	SA		7
202	SB		7
202	SC		7
202	SD		7

Reprice the order: When you select *Reprice* at the Order Detail screen, the system reprices the lines on the order in ascending price, order line number sequence.

- *Multiples Unselected*
- *Multiples Selected, Distinct By Blank*
- *Multiples Selected, Distinct By Item*
- *Multiples Selected, Distinct By SKU*
- *Multiples Selected, Distinct By Item Category*

Multiples Unselected

Because Multiples for price code 202 is unselected, once the order qualifies for the price code based on the price code quantity requirement, the system applies price code 202 to all qualifying items on the order that are not already assigned to a price code.

Line#	Item	SKU	Initial Price	Price Code	Reprice
1	SA	SML	\$10.00	202	The system applies price code 202 to order lines 1 and 2: Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
2	SA	SML	\$10.00	202	
3	SB	SML	\$10.00	202	Now that the order qualifies for price code 202, the system applies price code 202 to all qualifying items on the order that are not already assigned to a price code: Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
4	SC	SML	\$10.00	202	
5	SD	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
6	SD	MED	\$10.00	202	
7	SD	LRG	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00

Multiples Selected, Distinct By Blank

Because Multiples for price code 202 is selected and the Distinct By is blank, the order must meet the price code quantity requirement again in order to qualify.

Line#	Item	SKU	Initial Price	Price Code	Reprice
1	SA	SML	\$10.00	202	The system applies price code 202 to order lines 1 and 2: Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
2	SA	SML	\$10.00	202	
3	SB	SML	\$10.00	202	The system then applies price code 202 to order lines 3 and 4: Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
4	SC	SML	\$10.00	202	

Line#	Item	SKU	Initial Price	Price Code	Reprice
5	SD	SML	\$10.00	202	The system then applies price code 202 to order lines 5 and 6: Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
6	SD	MED	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
7	SD	LRG	\$10.00	none	Order line 7 does not qualify since it does not meet the price code quantity requirement of 2. Remains \$10.00

Multiples Selected, Distinct By Item

Because Multiples for price code 202 is selected and the Distinct By is *Item*, the price code requires separate items in the required quantity in order to qualify.

Line#	Item	SKU	Initial Price	Price Code	Reprice
1	SA	SML	\$10.00	202	The system applies price code 202 to order lines 1 and 3: Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
3	SB	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
2	SA	SML	\$10.00	202	The system then applies price code 202 to order lines 2 and 4: Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
4	SC	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
5	SD	SML	\$10.00	none	Order lines 5, 6 and 7 do not qualify for price code 202 since they do not meet the price code quantity requirement of 2 by item. Remains \$10.00
6	SD	MED	\$10.00	none	Remains \$10.00
7	SD	LRG	\$10.00	none	Remains \$10.00

Multiples Selected, Distinct By SKU

Because Multiples for price code 202 is selected and the Distinct By is *SKU*, the price code requires separate SKUs in the required quantity in order to qualify.

Line#	Item	SKU	Initial Price	Price Code	Reprice
					The system applies price code 202 to order lines 1 and 2:

Line#	Item	SKU	Initial Price	Price Code	Reprice
1	SA	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
3	SB	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 The system then applies price code 202 to order lines 3 and 4:
2	SA	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
4	SC	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 The system then applies price code 202 to order lines 5 and 6:
5	SD	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
6	SD	MED	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 Order line 7 does not qualify since it does not meet the price code quantity requirement of 2 by SKU.
7	SD	LRG	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00

Multiples Selected, Distinct By Item Category

Because Multiples for price code 202 is selected and the Distinct By is *Item Category*, the price code requires separate item categories in the required quantity in order to qualify.

Line	Item	SKU	Category	Initial Price	Price Code	Reprice
1	SA	SML	A	\$10.00	202	The system applies price code 202 to order lines 1 and 3: Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
3	SB	SML	B	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 The system then applies price code 202 to order lines 2 and 4:
2	SA	SML	A	\$10.00	none	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00

Line	Item	SKU	Category	Initial Price	Price Code	Reprice
4	SC	SML	C	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 Order lines 5, 6 and 7 do not qualify for price code 202 since they do not meet the price code quantity requirement of 2 by item category.
5	SD	SML	D	\$10.00	none	Remains \$10.00
6	SD	MED	D	\$10.00	none	Remains \$10.00
7	SD	LRG	D	\$10.00	none	Remains \$10.00

Work with Price Codes Screen

Purpose: Use this screen to create and work with price codes used to define price breaks you offer for orders of a group of items.

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

Field	Description
Price code	This code defines a repricing method you offer to your customers when they order a sufficient quantity of items associated with this price code. Enter a price code and select <i>OK</i> to display price codes in numeric order, beginning with your entry. Numeric, 7 positions; Optional
Description	A description of the price code. Enter a full or partial description and select <i>OK</i> to display price codes that contain your entry. Alphanumeric, 30 positions; Required.
Seq (Sequence number)	This number controls the order in which the system evaluates pricing for an item; if two or more price codes would apply, the system uses the price code with the lowest sequence number. Numeric, 7 positions; display-only.

Field	Description
Discount	The type of discount: • <i>Price Code Special Price Discount</i>: Displays as <i>Sp</i>: followed by the Special price. For orders subject to VAT, displays as <i>Tax incl price</i>: followed by the Tax inclusive price for special price. The discount is a special price for the qualifying items associated with the price code. • <i>Price Code Dollar Off Discount</i>: Displays as \$: followed by the Dollar discount. The discount is a dollar amount to subtract from the regular item price for the qualifying items associated with the price code. • <i>Price Code Percent Off Discount</i>: Displays as %: followed by the Percent discount. The discount is a percentage to subtract from the regular item price for the qualifying items associated with the price code. • <i>Price Code Group Price Discount</i>: Displays as <i>Grp</i>: followed by the Group price. For orders subject to VAT, displays as <i>Grp tax incl</i>: followed by the Tax inclusive price for group price. The discount is a group price for the qualifying items associated with the price code. Numeric, 13 positions with a 2-place decimal; display-only.
Start Date	The beginning date when the price code discount becomes effective. The system compares this date to the date on the Order Header to determine whether the order qualifies for the price code discount. Numeric, 6 positions (in user date format); display-only.
End Date	The end date when the price code discount becomes effective. The system compares this date to the date on the Order Header to determine whether the order qualifies for the price code discount. Numeric, 6 positions (in user date format); display-only.
Screen Option	Procedure
Create a price code	Select <i>Create</i> to advance to the Create Price Code Screen .
Change a price code	Select <i>Change</i> for a price code to advance to the Change Price Code screen. You can change any information on this screen except the Price code field. For field descriptions, see <i>Create Price Code Screen</i> .
Delete a price code	Select <i>Delete</i> for a price code to delete it. When you delete a price code, the system deletes any associated records in the Price Code Customer table.
Display a price code	Select <i>Display</i> for a price code to advance to the Display Price Code screen. You cannot change any fields on this screen. For field descriptions, see <i>Create Price Code Screen</i> .
Define the customer price group or sold to customer number eligible for the price code discount	Select <i>Customer</i> for a price code to advance to the Work with Qualifying Customer/Price Groups Screen .
Create, update, and delete records in the Price Code, Price Code Customer, and Price Code Details tables from an external system	Select <i>Upload</i> . See Price Code Upload for processing details.

Create Price Code Screen

Purpose: Use this screen to create a price code.

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

Field	Description
Price code	This code defines a repricing method to apply in Order Entry when the customer orders a sufficient quantity of qualifying items. Numeric, 7 positions. Create screen: required. Change screen: display-only.
Description	A description of the price code. Alphanumeric, 30 positions; required.
Start date	The beginning date when the price code discount becomes effective. Numeric, 6 positions (in user date format); optional.
End date	The end date when the price code discount becomes effective. Numeric, 6 positions (in user date format); optional.
Qty required	The total quantity the customer must order of all qualifying items to get the price break.  Note: The system evaluates minimum price code quantity by ship-to address.
Distinct By	Numeric, 7 positions; required. The method the system uses to determine whether the customer ordered the quantity required to receive the group price. Valid values: • <i>Item</i> = The quantity required is by item. • <i>SKU</i> = The quantity required is by SKU. • <i>Category</i> = The quantity required is by item category. Optional.

Field	Description
Allow Multiples	Defines whether the order qualifies for a discount multiple times if the correct number of qualifying items/SKUs is added to the order. <i>Selected</i> = Allow multiples. <i>Unselected</i> = Do not allow multiples. This field must be selected if you define a <i>Distinct By</i> setting or <i>Group price</i>.
One of the following repricing methods is required: <i>Special price</i> <i>Dollar discount</i> <i>Percent discount</i> <i>Group price</i>	NA
Special price	The special price to charge the customer for all qualifying items associated with the price code. Numeric, 13 positions with a 2-place decimal; required if dollar discount percent discount, or group price not entered.
Tax inclusive price for special price	The special price to charge the customer for all qualifying items associated with the price code on orders subject to VAT. Displayed only if the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i>.



Note:

If an order is subject to VAT, but the item is subject to a price code with a only a special price and not a Tax-inclusive price, the system uses the special price for the price code.

Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Dollar discount	The dollar amount to subtract from the regular price of each qualifying item associated with the price code. If the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i>, the system applies the discount against the regular tax-inclusive price to calculate the tax-inclusive price code price. Numeric, 13 positions with a 2-place decimal; required if special price, percent discount, or group price not entered.
Percent discount	The percentage of the regular item price to subtract for each qualifying item associated with the price code. If the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i>, the system applies the discount against the regular tax-inclusive price to calculate the tax-inclusive price code price. Numeric, 5 positions with a 2-place decimal; required if special price, dollar discount, or group price not entered.
Group price	The group price to charge the customer for all qualifying items associated with the price code. Numeric, 13 positions with a 2-place decimal; required if special price, dollar discount, or percent discount not entered.
Tax inclusive price for group price	The group price to charge the customer for all qualifying items associated with the price code on orders subject to VAT. Displayed only if the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i>.

 Note:

If an order is subject to VAT, but the item is subject to a price code with a only a special price and not a Tax-inclusive price, the system uses the special price for the price code.

Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Sequence	The order in which the system evaluates whether a price code applies to an order. <i>Regular Price Code Pricing:</i> If an order qualifies for two or more price codes, the system uses the price code with the lowest sequence number. If two price codes have the same sequence number, the system uses the price code with the lowest price code number. <i>Customer Price Group Price Code Pricing:</i> If an order qualifies for two or more price codes, the system uses the price code that provides the greatest discount to the order. If two price codes provide the same discount, the system uses the price code with the lowest sequence number. If two price codes have the same sequence number, the system uses the price code with the lowest price code number. Numeric, 7 positions; required.

 Note:

The system will not prevent you from defining a repricing method that would change the item price into a credit (that is, a discount of more than 100% the item price).

Work with Qualifying Customer/Price Groups Screen

Purpose: Use this screen to define the customer price groups and sold to customers that qualify for the price code discount.

 Important:

If you do not define any sold to customers or customer price groups for a price code, then ALL sold to customers and customer price groups qualify for the price code.

How to display this screen: Select *Customer* for a price code at the *Work with Price Codes Screen*.

Qualifying customers display on this screen in alphanumeric sold to customer number, price group code sequence.

Fields	Description
Price Code	The code and description of the price code. Code: Numeric, 7 positions; display-only. Description: Alphanumeric, 30 positions; display-only.
Group	The code for the customer price group that qualifies for the price code discount. Customer price group codes are defined in and validated against the Customer Price Group table. Alphanumeric, 4 positions; Required if a customer is not defined.
Customer	The sold to customer number that qualifies for the price code discount. Sold to customer numbers are defined in and validated against the Customer Sold To table. Numeric, 9 positions; Required if a customer price group is not defined.
Name	The description of the customer price group code or the name of the sold to customer. - If a company is not defined for the customer, the last name followed by the first name displays; for example: LAST, FIRST. - If a company is defined for the customer, the company name followed by the last name and first name displays; for example: MILL VILLAGE ATTN:NONNIE, NO. The system truncates the name to 30 positions. Alphanumeric, 30 positions; display-only.

Screen Option	Procedure
Define a qualifying customer price group	Enter a valid customer price group code and select <i>OK</i> . The qualifying customer price group displays in the bottom half of the screen.
Define a qualifying sold to customer	Enter a valid sold to customer number and select <i>OK</i> . The qualifying sold to customer number display in the bottom half of the screen.
Delete a qualifying customer price group or sold to customer	Select <i>Delete</i> for a qualifying customer price group or sold to customer to delete it.

Price Code Upload

Overview: The Price Code Upload allows you to upload price code information from an external system to create, update, or delete records in the Price Code, Price Code Customer, and Price Code Details tables.

In this topic:

- [Price Code Upload Setup](#)
- [Price Code Upload Process](#)
- [Price Code Upload Errors](#)
- [Price Code Upload Errors Report](#)

For more information: See [Working with Price Codes \(WPCD\)](#) and [Assigning Price Codes \(APCD\)](#).

Price Code Upload Setup

The setup required to use the price code upload includes:

- [Price Code Upload Table \(PriceCdUpload\)](#)
- [PCUPLD Price Code Upload Periodic Function](#)

File for Upload

Create a Price Code text file for the price code information you wish to create, update, or delete. The file should be named `PRICECDUPLOAD.txt`.

Note:

- The [Request Type](#) identifies the type of upload record.
- You must create records in this file in the correct order; for example, you must process a Price Code upload record before you can upload a Price Code Customer upload record and Price Code Detail upload record for that price code. The system processes the records in ascending [Seq #](#) order.
- Decimals in this file are explicit and not implied; for example, pass 19.99 and not 1999.
- To leave any field in the upload file blank, pass a space in an alphanumeric field and a 0 in a numeric field so that the file can be processed without errors. Leaving a field with no space or 0 is interpreted as null in the database and causes errors.

See the [Price Code Upload Process](#) for more information on using the data in the text file.

Sample data: You can use the sample data below to create a price code upload file.

Sample PCO Price Code Upload record type:

```
7|1|PCO|U|1150416|1234567|PRICE CODE UPLOAD|1|1|5.00|0.00|0.00|0.00|0.00|ITEM|
Y|1150401|1150501|||||0||||
```

Sample PCC Price Code Customer Upload record type:

```
7|2|PCC|U|1150416|1234567||0|0|.00|.00|.00|.00|.00|.00|||0|0||||55||||
```

Sample PCD Price Code Detail Upload record type:

```
7|3|PCD|U|1150416|1234567||0|0|.00|.00|.00|.00|.00|.00|||0|0|SKU|RED||SOURCE7|0||||
```

Price Code Upload Table (PriceCdUpload)

This table contains upload records for the Price Code, Price Code Customer, and Price Code Detail tables. The [Request Type](#) identifies the type of upload record.

Field	Description
Company	Required for all Record Types. A code for the company associated with the Price Code Upload record. The system processes only records associated with the company from where the Price Code Upload Process was submitted. Company codes are defined in and validated against the Company table. <i>Price Code:</i> Updates Company in the Price Code table. <i>Price Code Customer:</i> Updates Company in the Price Code Customer table. <i>Price Code Detail:</i> Updates Company in the Price Code Details table. Numeric, 3 positions.
Seq #	Required for all Record Types. A unique number assigned to each Price Code Upload record. The system processes the records in the Price Code Upload table in ascending sequence number order. Numeric, 9 positions.
Record Type	Required for all Record Types. The type of Price Code Upload record. Valid values: • <i>PCO</i> = Price Code upload record; this record creates, updates, or deletes a record in the Price Code table. • <i>PCC</i> = Price Code Customer upload record; this record creates or updates a record in the Price Code Customer table. • <i>PCD</i> = Price Code Detail upload record; this record creates or updates a record in the Price Code Details table. Alphanumeric, 3 positions.
Request Type	Required for all Record Types. Indicates whether the Price Code Upload record creates, updates, or deletes a record. Valid values: • <i>U</i> = Valid for all Record Types. Create or update a record. The system determines whether the Price Code Upload record creates or updates an existing record by comparing the information in the Price Code Upload record with the existing records in the Order Management System table. See Price Code Upload Process for more information on how the system determines if the Price Code Upload record creates a new record or updates an existing record. • <i>D</i> = Valid only for Record Type PCO Price Code. Delete a Price Code record and its associated Price Code Customer records and Price Code Detail records. The system uses the information in the Price Code Upload record to determine which records to delete. Alphanumeric, 1 position.
Record Date	Required for all Record Types. The date the Price Code Upload record was created. Numeric, 7 positions (CYMMDD format).

Field	Description
PCO Price Code	Required for all Record Types. A code to identify the price code to upload. Price codes are defined in and validated against the Price Code table. <i>Price Code</i>: Updates PCO Price Code in the Price Code table. <i>Price Code Customer</i>: Updates Price Code Code in the Price Code Customer table. <i>Price Code Detail</i>: Updates PCO Price Code in the Price Code Details table. Numeric, 7 positions.
Description	Required for Record Type PCO Price Code. Not used by Record Type PCC Price Code Customer or PCD Price Code Detail. A description of the price code. Updates PCO Description in the Price Code table. Alphanumeric, 30 positions.
PCO Sequence	Required for Record Type PCO Price Code. Not used by Record Type PCC Price Code Customer or PCD Price Code Detail. The order in which the system evaluates whether a price code applies to an order. Regular Price Code Pricing: If an order qualifies for two or more price codes, the system uses the price code with the lowest sequence number. If two price codes have the same sequence number, the system uses the price code with the lowest price code number. Customer Price Group Price Code Pricing: If an order qualifies for two or more price codes, the system uses the price code that provides the greatest discount to the order. If two price codes provide the same discount, the system uses the price code with the lowest sequence number. If two price codes have the same sequence number, the system uses the price code with the lowest price code number. Updates PCO Sequence in the Price Code table. Numeric, 7 positions.
PCO Qty Required	Required for Record Type PCO Price Code. Not used by Record Type PCC Price Code Customer or PCD Price Code Detail. The total quantity the customer must order of all qualifying items to get the price break. Updates PCO Qty Required in the Price Code table. Numeric, 7 positions.
PCO Percent Discount	Required for Record Type PCO Price Code if a PCO Dollar Discount, PCO Special Price, or Group Price is not defined. Not used by Record Type PCC Price Code Customer or PCD Price Code Detail. The percentage of the regular item price to subtract for each qualifying item associated with the price code. If the Tax Included in Price (E70) system control value is <i>selected</i>, the system applies the discount against the regular tax-inclusive price to calculate the tax-inclusive price code price. Updates PCO Percent Discount in the Price Code table. Numeric, 7 positions with a 2-place decimal.

Field	Description
PCO Dollar Discount	Required for <i>Record Type</i> PCO Price Code if a <i>PCO Percent Discount</i>, <i>PCO Special Price</i>, or <i>Group Price</i> is not defined. Not used by <i>Record Type</i> PCC Price Code Customer or PCD Price Code Detail. The dollar amount to subtract from the regular price of each qualifying item associated with the price code. If the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i>, the system applies the discount against the regular tax-inclusive price to calculate the tax-inclusive price code price. Updates PCO Dollar Discount in the Price Code table. Numeric, 13 positions with a 2-place decimal.
PCO Special Price	Required for <i>Record Type</i> PCO Price Code if a <i>PCO Percent Discount</i>, <i>PCO Dollar Discount</i>, or <i>Group Price</i> is not defined. Not used by <i>Record Type</i> PCC Price Code Customer or PCD Price Code Detail. The special price to charge the customer for all qualifying items associated with the price code. Updates PCO Special Price in the Price Code table. Numeric, 13 positions with a 2-place decimal.
PCO Tax Special Price	Required for <i>Record Type</i> PCO Price Code if a <i>PCO Percent Discount</i>, <i>PCO Dollar Discount</i>, or <i>Group Price</i> is not defined and the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i>. Not used by <i>Record Type</i> PCC Price Code Customer or PCD Price Code Detail. The special price to charge the customer for all qualifying items associated with the price code on orders subject to VAT. Used only if the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i>.
	 Note: If an order is subject to VAT, but the item is subject to a price code with a only a special price and not a Tax-inclusive price, the system uses the special price for the price code.
Group Price	Updates PCO Tax Special Price in the Price Code table. Numeric, 13 positions with a 2-place decimal. Required for <i>Record Type</i> PCO Price Code if a <i>PCO Percent Discount</i>, <i>PCO Dollar Discount</i>, or <i>PCO Special Price</i> is not defined. Not used by <i>Record Type</i> PCC Price Code Customer or PCD Price Code Detail. The group price to charge the customer for all qualifying items associated with the price code. Updates PCO Group Price in the Price Code table. Numeric, 13 positions with a 2-place decimal.

Field	Description
PCO Tax Group Price	Required for <i>Record Type</i> PCO Price Code if a <i>PCO Percent Discount</i>, <i>PCO Dollar Discount</i>, or <i>PCO Special Price</i> is not defined and the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i>. Not used by <i>Record Type</i> PCC Price Code Customer or PCD Price Code Detail. The group price to charge the customer for all qualifying items associated with the price code on orders subject to VAT. Used only if the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i>.
	 Note: If an order is subject to VAT, but the item is subject to a price code with a only a group price and not a Tax-inclusive price, the system uses the group price for the price code.
Distinct By	Updates PCO Tax Special Price in the Price Code table. Numeric, 13 positions with a 2-place decimal. Optional for <i>Record Type</i> PCO Price Code. Not used by <i>Record Type</i> PCC Price Code Customer or PCD Price Code Detail. The method the system uses to determine whether the customer ordered the quantity required to receive the group price. Valid values: - Blank = Distinct By setting not defined. - ITEM = The quantity required is by item. - SKU = The quantity required is by SKU. - CATEGORY = The quantity required is by item category. Updates PCO Distinct By in the Price Code table. Alphanumeric, 10 positions.
Multiples	Required for <i>Record Type</i> PCO Price Code if a Distinct By setting or Group Price is defined. Not used by <i>Record Type</i> PCC Price Code Customer or PCD Price Code Detail. Defines whether the order qualifies for a discount multiple times if the correct number of qualifying items/SKUs is added to the order. - Blank = Multiples setting not defined. - Y = Allow multiples. Must be Y if the Distinct By field is populated. - N = Do not allow multiples. Updates PCO Allow Multiples in the Price Code table. Alphanumeric, 1 position.
Start Date	Optional for <i>Record Type</i> PCO Price Code. Not used by <i>Record Type</i> PCC Price Code Customer or PCD Price Code Detail. The beginning date when the price code discount becomes effective. Updates PCO Start Date in the Price Code table. Numeric, 7 positions (CYYMMDD format).

Field	Description
End Date	Optional for Record Type PCO Price Code. Not used by Record Type PCC Price Code Customer or PCD Price Code Detail. The end date when the price code discount becomes effective. The end date cannot be earlier than the start date or earlier than the current date. Updates PCO End Date in the Price Code table. Numeric, 7 positions (CYMMDD format).
ITM Number	Required for Record Type PCD Price Code Detail. Not used by Record Type PCO Price Code or PCC Price Code Customer. A code for the item to assign to the price code. Item codes are defined in and validated against the Item table. Updates ITM Number in the Price Code Details table. Alphanumeric, 12 positions.
SKU Code	Required for Record Type PCD Price Code Detail if the item contains SKUs and you want to specify which SKUs qualify for the price code; leave blank if all SKUs for the item qualify for the price code. Not used by Record Type PCO Price Code or PCC Price Code Customer. A code for the SKU to assign to the price code. SKU codes are defined in and validated against the SKU table. Updates SKU Code in the Price Code Details table. Alphanumeric, 14 positions.
Offer Number	Required for Record Type PCD Price Code Detail if a SRC Source Code is not defined. Not used by Record Type PCO Price Code or PCC Price Code Customer. A catalog, advertisement, or other means you use to present merchandise to your customers. The price code defined for an item/offer combination applies to orders whose header-level source code points to the offer. Offers are defined in and validated against the Offer table. See Working with Offers (WOFR). Updates Offer Number in the Price Code Details table. Alphanumeric, 3 positions.
SRC Source Code	Required for Record Type PCD Price Code Detail if a Offer Number is not defined. Not used by Record Type PCO Price Code or PCC Price Code Customer. A code you use to group a segment of your customers. The price code defined for this item/source code combination applies to orders with this source code on the order header. Source codes are defined in and validated against the Source Code table. See Working with Source Codes (WSRC). Updates SRC Source Code in the Price Code Details table. Alphanumeric, 9 positions.

Field	Description
Customer	Required for Record Type PCC Price Code Customer if a Customer Price Group is not defined. Not used by Record Type PCO Price Code or PCD Price Code Detail. The sold to customer number that qualifies for the price code. Sold to customer numbers are defined in and validated against the Customer Sold To table. Updates Customer # in the Price Code Customer table. Numeric, 9 positions.
Customer Price Group	Required for Record Type PCC Price Code Customer if a Customer is not defined. Not used by Record Type PCO Price Code or PCD Price Code Detail. The code for the customer price group that qualifies for the price code discount. Customer price group codes are defined in and validated against the Customer Price Group table. Updates Customer Price Group in the Price Code Customer table. Alphanumeric, 4 positions.
Error Description	Updated by the system during the Price Code Upload Process. The reason why the Price Code Upload record has been placed in an error status. See Price Code Upload Errors. Alphanumeric, 20 positions.
Processed	Updated by the system during the Price Code Upload Process. The status of the Price Code Upload record. Valid values: - Blank = The Price Code Upload record has not yet been processed. - P = The Price Code Upload record has processed successfully. The system removes these records at the end of the Price Code Upload Process. - E = The Price Code Upload record contains errors. See Price Code Upload Errors. Alphanumeric, 1 position.

PCUPLD Price Code Upload Periodic Function

Use the *PCUPLD* periodic function to update the Price Code table after you have completed the [File for Upload](#).

Option	Setting
Function:	PCUPLD
Description:	PRICE CODE UPLOAD
Program name:	PFPRCCODUP
Company	The Company flag must be <i>selected</i> . The Price Code Upload process creates, updates, and deletes records in the Price Code, Price Code Customer, and Price Code Details tables based on the records in the Price Code Upload Table (PriceCdUpload) using the company you entered when you submitted the <i>PCUPLD</i> periodic function.

- The PCUPLD periodic function is delivered with the system; use the [Working with Periodic Functions \(WPER\)](#) menu option to review it.

- Use the [Working with Periodic Processes \(WPPR\)](#) menu option to assign the UPPRCCD and PCUPLD periodic function to a periodic process.
- Once you have created the periodic process, you can use the Execute Periodic Process screen (located in the [Working with Periodic Processes \(WPPR\)](#) or [Executing Periodic Processes \(EPRO\)](#)) to define a schedule for the job. See [Defining the Job Schedule](#).

For more information: See delivered with the system; use the [Scheduling Jobs](#) for more information on [How to Schedule a Job](#).

Price Code Upload Process

Use the following steps to upload Price Code records from an external system.

#	Step
1.	Create a text file named PRICECDUPLOAD.txt containing the price code data. See File for Upload for more information. Update <i>Price Code Upload Table (PriceCdUpload)</i> with price code information from the text file: • Use the File Storage API to create a record of the PRICECDUPLOAD file in the FILE_STORAGE table, and then run the <i>UPPRCCD Upload Price Code File</i> (Program name PFR0134, Parameter PRICECDUPLOAD) periodic function, or • Place the file in the CWDIRECTCP_UPLOAD_DIRECTORY if the file storage API is not enabled, and then run the <i>UPPRCCD Upload Price Code File</i> (Program name PFR0134, Parameter PRICECDUPLOAD) periodic function, or • Use the Work with File Uploads (WUPL) menu option to upload the file.
2.	Submit the Price Code Upload process: • Execute the PCUPLD Price Code Upload Periodic Function. The system submits the process for the specified company. • Select <i>Upload</i> on the Work with Price Codes Screen. The system submits the process for the company you are currently in. The Record Type identifies the type of upload record: • PCO = Price Code upload record. • PCC = Price Code Customer upload record. • PCD = Price Code Detail upload record.
3.	The system updates the Processed field for each record in the Price Code Upload table to blank to include all records in the upload process.
4.	The system processes the records in the Price Code Upload table in Seq # order.
5.	The system validates each record in the <i>Price Code Upload Table (PriceCdUpload)</i> .

Step

PCO Price Code Upload Record Validation

The required fields for Record Type *PCO* Price Code are:

- *Company*: Validated against the Company table.
- *Seq #*
- *Record Type*: Must be *PCO*.
- *PCO Price Code*: Validated against the Price Code table.
- *Request Type*: *U* = Create or update. *D* = Delete.
- If the Request type is *U* and the price code does not exist in the Price Code table for the specified company, the system creates a new record in the Price Code table.
- If the Request type is *U* and the price code exists in the Price Code table for the specified company, the system overlays the existing record in the Price Code table with the values that are passed in the upload.
- If the Request type is *D* and the price code exists in the Price Code table for the specified company, the system deletes the existing record in the Price Code table and the associated records in the Price Code Customer and Price Code Details tables.
- If the Request type is *D* and the price code does not exist in the Price Code table for the specified company, the system places the upload record in an error status.
- *Description*
- *PCO Sequence*
- *PCO Qty Required*
- Enter only one of the following:
- *PCO Percent Discount*
- *PCO Dollar Discount*
- *PCO Special Price*; also *PCO Tax Special Price* if the *Tax Included in Price (E70)* system control value is *selected*.
- *Group Price*; also *PCO Tax Group Price* if the *Tax Included in Price (E70)* system control value is *selected*.

Optionally, you can define:

- *Start Date* and *End Date*: The end date cannot be earlier than the start date.
- *Distinct By*: Valid values are *ITEM*, *SKU*, and *CATEGORY*.
- *Multiples*: Valid values are *Y* and *N*; must be *Y* if a *Distinct By* setting or *Group Price* is defined.

PCC Price Code Customer Upload Record Validation

The required fields for Record Type *PCC* Price Code Customer are:

- *Company*: Validated against the Company table.
- *Seq #*
- *Record Type*: Must be *PCC*.
- *PCO Price Code*: Validated against the Price Code table.
- *Request Type*: *U* = Create or update.
- If the Request type is *U* and the price code does not exist in the Price Code Customer table for the specified company and customer or customer price group, the system creates a new record in the Price Code Customer table.
- If the Request type is *U* and the price code exists in the Price Code Customer table for the specified company and customer or customer price group, the system overlays the existing record in the Price Code Customer table with the values that are passed in the upload.
- Enter one of the following:
- *Customer*: Validated against the Customer Sold To table.
- *Customer Price Group*: Validated against the Customer Price Group table.

#	Step
	PCD Price Code Detail Upload Record Validation The required fields for Record Type <i>PCD</i> Price Code Detail are: • <i>Company</i>: Validated against the Company table. • <i>Seq #</i> • <i>Record Type</i>: Must be <i>PCD</i>. • <i>PCO Price Code</i>: Validated against the Price Code table. • <i>Request Type</i>: <i>U</i> = Create or update. • If the Request type is <i>U</i> and the price code does not exist in the Price Code Details table for the specified company and item/SKU/offer or item/SKU/source code combination, the system creates a new record in the Price Code Details table. • If the Request type is <i>U</i> and the price code exists in the Price Code Details table for the specified company and item/SKU/offer or item/SKU/source code combination, the system overlays the existing record in the Price Code Details table with the values that are passed in the upload. • <i>ITM Number</i>: Validated against the Item table. • Enter one of the following: • <i>Offer Number</i>: Validated against the Offer table. • <i>SRC Source Code</i>: Validated against the Source Code table. Optionally, you can define: • <i>SKU Code</i>: Validated against the SKU table. Must be a valid SKU for the specified <i>ITM Number</i>. • If you define a SKU code, the price code applies only to the SKUs specified for the item in the Price Code Details table. • If you do not define a SKU Code, the price code applies to all SKUs of the item. 6. If the record in the Price Code Upload table does not pass validation, the system: • Retains the record in the <i>Price Code Upload Table (PriceCdUpload)</i> and updates the <i>Processed</i> field to <i>E</i> Error. • Prints the record on the <i>Price Code Upload Errors Report</i>. A record in error remains in the Price Code Upload table until you fix or delete it. The system validates the record again the next time you submit the Price Code Upload Process. 7. If the record in the Price Code Upload table passes validation, the system: • Creates, updates, or deletes the appropriate record in the Order Management System database, based on the <i>Record Type</i> and <i>Request Type</i>. • Deletes the record from the <i>Price Code Upload Table (PriceCdUpload)</i>. • Prints the record on the <i>Price Code Upload Errors Report</i> You can review or maintain: • Price Code records on the <i>Work with Price Codes Screen</i> in the <i>dWorking with Price Codes (WPCD)</i> menu option. • Price Code Customer records on the <i>Work with Qualifying Customer/Price Groups Screen</i> in the <i>dWorking with Price Codes (WPCD)</i> menu option. • Price Code Detail records using the <i>Assigning Price Codes (APCD)</i> menu option.

Price Code Upload Errors

The system includes Price Code Upload records that are in error on the *Price Code Upload Errors Report*.

Error	Reason
General Errors The following errors can occur for any <i>Record Type</i> .	
Invalid Company	The <i>Company</i> is missing, invalid, or inactive.
Invalid Seq#	The <i>Seq #</i> is missing.
Record Type not found	The <i>Record Type</i> is missing or invalid. Valid values: • <i>PCO</i> = Price Code upload record; this record creates, updates, or deletes a record in the Price Code table. • <i>PCC</i> = Price Code Customer upload record; this record creates or updates a record in the Price Code Customer table. • <i>PCD</i> = Price Code Detail upload record; this record creates or updates a record in the Price Code Details table.
Invalid Request Type	The <i>Request Type</i> is missing or invalid. Valid values: • <i>U</i> = Valid for all <i>Record Types</i>. Create or update a record. The system determines whether the Price Code Upload record creates or updates an existing record by comparing the information in the Price Code Upload record with the existing records in the Order Management System table. • <i>D</i> = Valid only for <i>Record Type PCO</i> Price Code. Delete a Price Code record and its associated Price Code Customer records and Price Code Detail records. The system uses the information in the Price Code Upload record to determine which records to delete.
Invalid Record Date	The <i>Record Date</i> is missing or invalid. Must be in CYYMMDD format.
Invalid Price Code	The <i>PCO Price Code</i> is missing or invalid.
Price Code Table Errors The following errors can occur if the <i>Record Type</i> for the record in the Price Code Upload table is <i>PCO</i> Price Code.	
Invalid Seq #	The <i>PCO Sequence</i> is missing or invalid.
Invalid Qty Req'd	The <i>PCO Qty Required</i> is missing or invalid.
Discount Missing	You must enter a <i>PCO Percent Discount</i> , <i>PCO Dollar Discount</i> , <i>PCO Special Price</i> , or <i>Group Price</i> .
Discount Conflict	You can define only one type of discount: <i>PCO Percent Discount</i> , <i>PCO Dollar Discount</i> , <i>PCO Special Price</i> , or <i>Group Price</i> .
Invalid Distinct by	The <i>Distinct By</i> field is invalid. Valid values: • Blank = Distinct By setting not defined. • <i>ITEM</i> = The quantity required is by item. • <i>SKU</i> = The quantity required is by SKU. • <i>CATEGORY</i> = The quantity required is by item category.

Error	Reason
Invalid Multiples	The Multiples field is invalid or the Distinct By field is populated and the Multiples field is not set to Y. Valid values: - Blank = Multiples setting not defined. - Y = Allow multiples. - N = Do not allow multiples.
Invalid Start Date	The Start Date is invalid.
Invalid End Date	The End Date is invalid. This error can occur if the End Date is earlier than the current date.
Invalid Field Populated	Fields not related to the PCO Record Type are populated.
Price Code Customer Table Errors The following errors can occur if the Record Type for the record in the Price Code Upload table is PCC Price Code Customer.	
Invalid Customer	The Customer is invalid.
Cust\CPG Conflict	You must define a Customer or Customer Price Group for a PCC Price Code Customer upload record, but not both.
Invalid Cust Prc Grp	The Customer Price Group is invalid.
Invalid PCC Record	Fields not related to the PCC Record Type are populated.
Price Code Detail Table Errors The following errors can occur if the Record Type for the record in the Price Code Upload table is PCD Price Code Detail.	
Invalid Item	The ITM Number is missing or invalid.
Invalid SKU	The SKU Code is invalid.
Invalid Offer	The Offer Number is invalid.
Offer\Src Conflict	You must define an Offer Number or SRC Source Code for a PCD Price Code Detail upload record, but not both.
Invalid Source	The SRC Source Code is invalid.
Invalid PCD Record	Fields not related to the PCD Record Type are populated.

Customer Price Group SKU Exclusion Upload

Overview: The Customer Price Group SKU Exclusion Upload allows you to upload customer price group SKU exclusion information from an external system to create or update records in the Customer Price Group SKU Exclusion table.

Customer Price Group SKU Exclusion allows you to define the items/SKUs that are not eligible for the customer price group discount applied to an order during [Customer Price Group Pricing](#).

If an item contains SKUs, you can exclude all SKUs for the item or indicate the specific SKUs you wish to exclude from the customer price group discount.

In this topic:

- [Customer Price Group Exclusion Upload Setup](#)

- [Customer Price Group SKU Exclusion Upload Process](#)
- [Customer Price Group Exclusion Upload Errors](#)
- [CPG Item/SKU Exclusions Upload Error Records Report](#)

For more information: See [Working with Customer Price Groups \(WCPG\)](#).

Customer Price Group Exclusion Upload Setup

The setup required to use the customer price group SKU exclusion upload includes:

1. [Customer Price Group SKU Exclusion Upload Table](#)
2. [CPGIXUP Customer Price Group Item Exclusion Upload Periodic Function](#)

Customer Price Group SKU Exclusion Upload Process

Use the following steps to upload Customer Price Group SKU Exclusion records from an external system.

#	Step
1.	Create a customer price group SKU exclusion text file that contains the records to upload. See the Customer Price Group SKU Exclusion Upload Table for details on file contents. Populate the Customer Price Group SKU Exclusion Upload Table using the contents of the text file: • Use the File Storage API to upload the file to the FILE_STORAGE table, and then run the UPCSTPG Upload Customer Price Group Exclusion File (Program name PFR0134, Parameter CUSTPGEUP) periodic function, or • Place the file in the CWDIRECTCP_UPLOAD_DIRECTORY if the file storage API is not enabled, and then run the UPCSTPG Upload Customer Price Group Exclusion File (Program name PFR0134, Parameter CUSTPGEUP) periodic function, or • Use the Work with File Uploads (WUPL) menu option to upload the records in the text file to the Customer Price Group SKU Exclusion Upload table.
2.	Execute the CPGIXUP Customer Price Group Item Exclusion Upload Periodic Function to submit the Customer Price Group Exclusion Upload process. The system submits the process for the specified company.
3.	The system updates the Processed field for each record in the Customer Price Group Exclusion Upload table to blank to include all records in the upload process.
4.	The system processes the records in the Customer Price Group Exclusion Upload table in Seq # order.
5.	The system validates each record in the Customer Price Group SKU Exclusion Upload Table. The required fields are: • Company: Validated against the Company table. • Seq # • Customer Price Group: Validated against the Customer Price Group table. • Item: Validated against the Item table. Optionally, you can define: • SKU: Validated against the SKU table. Must be a valid SKU for the specified Item. • If the item contains SKUs and you leave this field blank, all SKUs of the item are excluded from the customer price group discount. • If the item contains SKUs and you specify a SKU in this field, only the SKU specified is excluded from the customer price group discount.

#	Step
6.	If the record in the Customer Price Group SKU Exclusion Upload table does not pass validation, the system: - Retains the record in the <i>Customer Price Group SKU Exclusion Upload Table</i> and updates the <i>Processed</i> field to <i>E Error</i>. - Prints the record on the CPG Item/SKU Exclusions Upload Error Records Report. A record in error remains in the Customer Price Group SKU Exclusion Upload table until you fix or delete it. The system validates the record again the next time you submit the Customer Price Group SKU Exclusion Upload Process.
7.	If the record in the Customer Price Group SKU Exclusion Upload table passes validation, the system: - Creates or updates the appropriate record in the Order Administration database. - Deletes the record from the <i>Customer Price Group SKU Exclusion Upload Table</i>. You can review and maintain customer price group SKU exclusions on the Work with Customer Price Group Exclusions Screen in the Working with Customer Price Groups (WCPG) menu option.

Customer Price Group SKU Exclusion Upload Table

Create records in the Customer Price Group SKU Exclusion Upload table to create or update records in the Customer Price Group SKU Exclusion table.

To populate:

- Create a customer price group SKU exclusion text file that contains the records to upload.
- Upload the records from the file to the Customer Price Group SKU Exclusion Upload table:
- Use the [File Storage API](#) to upload the file to the FILE_STORAGE table, and then run the *UPCSTPG Upload Customer Price Group Exclusion File* (Program name *PFR0134*, Parameter *CUSTPGEUP*) periodic function, or
- Use the [Work with File Uploads \(WUPL\)](#) menu option to upload the records in the text file to the Customer Price Group SKU Exclusion Upload table.

You can use the sample data below to create records in the text file for upload.

```
7|1|CPG|RF123SKU4567|ROSE XSML WMNS||
```



Note:

To leave any field in the upload file blank, pass a space in the field so that the file can be processed without errors. Leaving a field with no space is interpreted as null in the database and causes errors.

For more information: See [Customer Price Group SKU Exclusion Upload Process](#) for a discussion of the complete upload process.

Field	Description
Company	Required. A code for the company associated with the Customer Price Group SKU Exclusion Upload record. The system processes only records associated with the company from where the Customer Price Group SKU Exclusion Upload Process was submitted. Company codes are defined in and validated against the Company table. Updates Company in the Customer Price Group SKU Exclusion table. Numeric, 3 positions.
Seq #	Required. A unique number assigned to each Customer Price Group SKU Exclusion Upload record. The system processes the records in the Customer Price Group SKU Exclusion Upload table in ascending sequence number order. Numeric, 9 positions.
Customer Price Group	Required. The code for the customer price group associated with the item/SKU exclusion. Customer price group codes are defined in and validated against the Customer Price Group table. Updates Customer Price Group in the Customer Price Group SKU Exclusion table. Alphanumeric, 4 positions.
Item	Required. A code for the item you wish to exclude from the customer price group discount. Item codes are defined in and validated against the Item table. Updates Excluded Item in the Customer Price Group SKU Exclusion table. Alphanumeric, 12 positions.
SKU	Optional. The SKU of the item you wish to exclude from the customer price group discount. 1. If the item contains SKUs and you leave this field blank, all SKUs of the item are excluded from the customer price group discount. 2. If the item contains SKUs and you specify a SKU in this field, only the SKU specified is excluded from the customer price group discount. SKU codes are defined in and validated against the SKU table. Updates Excluded SKU in the Customer Price Group SKU Exclusion table. Alphanumeric, 14 positions.
Error Description	Updated by the system during the Customer Price Group SKU Exclusion Upload Process. The reason why the Customer Price Group Exclusion Upload record has been placed in an error status. See Customer Price Group Exclusion Upload Errors. Alphanumeric, 20 positions.

Field	Description
Processed	Updated by the system during the Customer Price Group SKU Exclusion Upload Process. The status of the Customer Price Group Exclusion Upload record. Valid values: - Blank = The Customer Price Group Exclusion Upload record has not yet been processed. - P = The Customer Price Group Exclusion Upload record has processed successfully. The system removes these records at the end of the Customer Price Group SKU Exclusion Upload Process. - E = The Customer Price Group Exclusion Upload record contains errors. See Customer Price Group Exclusion Upload Errors. Alphanumeric, 1 position.

CPGIXUP Customer Price Group Item Exclusion Upload Periodic Function

Use the *CPGIXUP* periodic function to submit the *Customer Price Group SKU Exclusion Upload Process* based on the contents of the *Customer Price Group SKU Exclusion Upload Table*.

Option	Setting
Function:	CPGIXUP
Description:	CPG ITEM EXCLUSION UPLOAD
Program name:	PFRCPGEXUP
Company	The Company flag must be <i>selected</i> . The Customer Price Group SKU Exclusion Upload process creates, updates, and deletes records in the Customer Price Group SKU Exclusion table based on the records in the <i>Customer Price Group SKU Exclusion Upload Table</i> using the company you entered when you submitted the <i>CPGIXUP</i> periodic function.

1. The *CPGIXUP* periodic function is delivered with the system; use the [Working with Periodic Functions \(WPER\)](#) menu option to review it.
2. Use the [Working with Periodic Processes \(WPPR\)](#) menu option to assign the *UPCSTPG* and *CPGIXUP* periodic functions to a periodic process.
3. Once you have created the periodic process, you can use the Execute Periodic Process screen (located in the [Working with Periodic Processes \(WPPR\)](#) or [Executing Periodic Processes \(EPRO\)](#)) to define a schedule for the job. See [Defining the Job Schedule](#).

For more information: See [Scheduling Jobs](#) for more information on [How to Schedule a Job](#).

Customer Price Group Exclusion Upload Errors

The system includes records in the [Customer Price Group SKU Exclusion Upload Table](#) that are in error on the [CPG Item/SKU Exclusions Upload Error Records Report](#).

Error	Reason
Invalid Company	The Company is missing, invalid, or inactive.
Invalid Cust Prc Grp	The Customer Price Group is missing or invalid.
Invalid Item	The Item is missing or invalid.

Error	Reason
Invalid SKU	The SKU is not valid for the specified item.

Customer Price Group Pricing

Customer price group pricing allows you to price the items on an order based on the customer price group assigned to the sold to customer on the order. The system determines the initial price of the item based on the Price type assigned to the customer price group and applies any qualifying discounts to the order during line-level pricing and end-of-order pricing.

In this topic:

- [Customer Price Group Pricing Setup](#)
- [Line Level Customer Price Group Pricing](#)
- [Examples: Line Level Customer Price Group Pricing](#)
- [Customer Price Group Price Code Pricing](#)
- [Examples: Customer Price Group Price Code Pricing](#)
- [Customer Price Group Best Price Comparison](#)
- [Examples: Customer Price Group Best Price Comparison](#)
- [Customer Price Group Pricing in Order Maintenance](#)

Customer Price Group Pricing Setup

Before you can use the customer price group pricing method, you must complete the necessary setup.

- [Menu Options for Customer Price Group Pricing](#)
- [System Control Values for Customer Price Group Pricing](#)

Menu Options for Customer Price Group Pricing

Menu Option	Description
Working with Customer Price Groups (WCPG)	Create customer price groups to assign to sold to customers. For each customer price group: • Use the Price Type field to define the price the system uses as the initial price of an item during customer price group line level pricing. • <i>Original</i> = Use the Orig retail \$ (Original retail price) field in the SKU table as the initial price. • <i>Regular</i> = Use the List price field in the SKU table as the initial price. • Optionally, use the Discount field at the customer price group level or customer price group detail level to define a percent discount to prorate across the items on an order for a sold to customer assigned to this customer price group. • Optionally, select the Best Price Comparison field to have the system perform customer price group best price comparison logic for the customer price group during end-of-order pricing and repricing. Customer price group best price comparison determines if the price available for the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value is a better price than the price available for the customer price group assigned to the sold to customer. Whichever customer price group provides the best price, the system applies this price to the item on the order. • Optionally, use the Work with Customer Price Group Exclusions Screen to define the items/SKUs that are not eligible for the customer price group discount applied to the order during customer price group pricing.

Menu Option	Description
Creating and Updating Sold-to Customers (WCST)	Use the Price group field to assign sold to customers to a customer price group.



Note:

You can also pass the price group code in the *Inbound Order XML Message (CWORDERIN)* or the *Inbound Customer Message (CWCustomerIn)*. When you assign the customer price group through the order API, the new order is eligible for any pricing or promotions associated with the price group. If you create an order for a customer that is not assigned to a customer price group, or is assigned to an invalid customer price group code, the system assigns the customer price group code defined in the [Customer Price Group Code for CPG Pricing Only \(L58\)](#) system control value to the customer.

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

Creating and Working with Items (MITM)	For each item/SKU: Define the <i>Original</i> price of the item. - non-SKUed item: Use the Orig retail \$ field on the Create Item (Base Information) Screen. - SKUed item: Use the Orig retail \$ field on the Create SKU 1 of 2 (With Overrides) Screen. Define the <i>Regular</i> price of the item. - non-SKUed item: Use the List price field on the Create Item (Base Information) Screen. - SKUed item: Use the List price field on the Create SKU 1 of 2 (With Overrides) Screen. - Select the Discountable field on the Create Item Screen if the item is eligible for customer price group discounts. Assign the item/SKU to an offer in order to assign the item/SKU to a price code using the Assigning Price Codes (APCD) menu option.

Menu Option	Description
Working with Price Codes (WPCD)	Create price codes to offer a special price or discount for an item or group of items. Optionally, use the Work with Qualifying Customer/Price Groups Screen to define the sold to customers and customer price groups that qualify for the price code. Note: If you do not define any sold to customers or customer price groups for a price code, then ALL sold to customers and customer price groups qualify for the price code.
	 Note: Order lines that are assigned to a price code do not qualify for the discount defined for the customer price group assigned to the sold to customer on the order. To apply the customer price group discount to order lines that are assigned to a price code, embed the customer price group discount in the price defined for the price code. <i>Example:</i> If the customer price group provides a 30% discount, create the price code discount so that it includes the 30% discount.
Assigning Price Codes (APCD)	Define which items are eligible for the special price or discount specified in a price code. You can assign the item to one or more price codes by offer or source code.
Establishing Price Override Reason Codes (WPOR)	Create the price override reason code to assign to order lines that are priced using a customer price group price and cannot be further discounted. However, you can still apply an order-level coupon to these order lines.
Working with Source Codes (WSRC)	To perform End of Order Customer Price Group Pricing during repricing, the Price method field for the source code on the order header must be set to <i>Reg Plus Reprice</i> .
Working with Promotions (WPRO)	Create promotions to apply a further discount to eligible order lines.

System Control Values for Customer Price Group Pricing

Entity level override: You can set up pricing value overrides for an entity that should use different pricing logic from your company-wide standard. In order entry, the system checks the entity associated with the source code on the order header to determine if entity-level pricing overrides are in effect. However, if you enter a customer price group in the [Customer Price Group Code for CPG Pricing Only \(L58\)](#) system control value, entity-level pricing overrides are

NOT in effect. The system always uses the customer price group pricing method, regardless of the pricing values defined at the entity level.

System Control Value	Description
<i>Customer Price Group Code for CPG Pricing Only (L58)</i>	Enter a customer price group code if you wish to use customer price group pricing. The system uses this customer price group: • As the default customer price group to apply to an order when the sold to customer on the order is not assigned to a customer price group. • During customer price group best price comparison to determine if the price available for the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value is a better price than the price available for the customer price group assigned to the sold to customer. Whichever customer price group provides the best price, the system applies this price to the item on the order.
	 Note: If you enter a customer price group code in this system control value: • the system uses only customer price group pricing to perform line-level pricing. The system does NOT use the pricing hierarchy to search for a price for an item and does not perform best way pricing based on the setting of the <i>Best Way Pricing (A78)</i> system control value. • you must select the <i>Price Codes (D93)</i> system control value to perform end-of-order pricing and you cannot select any other type of end-of-order pricing method.
<i>Price Override Reason Code for CPG Pricing (L59)</i>	Enter the price override reason code to assign to order lines that are priced using a customer price group price and cannot be further discounted. However, you can still apply an order-level coupon to these order lines.

Line Level Customer Price Group Pricing

The system uses the following steps when you add an item to an order and the system uses customer price group line-level pricing to calculate the price of the order line.

- *Determine the Customer Price Group to Use*
- *Determine the Initial Price of the Item*
- *Determine the Customer Price Group Discount*
- *Compare List Price to Order Line Price*

- [Calculate Order Header Discounts](#)
- [Apply Final Customer Price Group Price to Order](#)

Determine the Customer Price Group

Determine the Customer Price Group to Use

The system uses the customer price group assigned to the sold to customer on the order. If a customer price group code is not assigned to the sold to customer on the order, or if it is invalid, the system uses the customer price group code defined in the [Customer Price Group Code for CPG Pricing Only \(L58\)](#) system control value.

Determine the Initial Price of the Item

If a price override reason code is defined for the order line, the system does not price the item using customer price group pricing, and instead, uses the price defined for the order line.

If a price override reason code is not defined for the order line, the system looks at the [Price Type](#) defined for the customer price group to determine the initial price of the item.

- *Original* = Original Price. The system uses the price defined in the [Orig retail \\$](#) (Original Retail Price) field in the SKU table as the initial price of the item.
- *Regular* = Regular Price. The system uses the price defined in the [List price](#) field in the SKU table as the initial price of the item.

If an initial price is not found for the item: If the system cannot determine the initial price for the item (an Original retail price or List price was not defined for the item), the system displays an error message in interactive order entry: *Price Not Found*.

Determine the Customer Price Group Discount

Item eligible for discount? An item is NOT eligible for customer price group discounting if:

- The [Discountable](#) field for the item is unselected.
- The item/SKU is excluded from the customer price group discount. These items display on the [Work with Customer Price Group Exclusions Screen](#) and exist in the Customer Price Group SKU Exclusion table.

If the Discountable field for the item is *selected* and the item/SKU is not excluded from the customer price group discount, the system will apply qualifying discounts and promotions to the item.

Customer price group discount hierarchy: The system determines if a discount exists for the customer price group on the order. The system uses the following hierarchy to determine the customer price group discount.

1. Use the discount defined in the Customer Price Group Detail table with an effective date that is equal to or earlier than the current date. If more than one Customer Price Group Detail record exists with a qualifying effective date, the system uses the discount with the most current effective date. You can review these discounts on the [Work with Customer Price Group Details Screen](#).
2. If a discount is not defined in the Customer Price Group Detail table with a qualifying effective date, use the discount defined in the Customer Price Group table. You can review this discount on the [Work with Customer Price Groups Screen](#).
3. If a discount is not defined in the Customer Price Group table, do not apply a customer price group discount to the order.

Customer price group discount calculation: Original or Regular Price - Customer Price Group Discount % = Updated Order Line Price

Compare List Price to Order Line Price

The system compares the list price defined for the item to the order line price.

- If the list price is lower than the order line price, the system applies the list price to the order line.
- If the list price is equal to or greater than the order line price, the system retains the order line price.

Display Order Detail: If the list price was lower than the order line price, the system displays a message on the [Display Order Detail Screen \(Reviewing Order Line Detail\)](#) in Order Inquiry:
LIST PRICE < ORIGINAL RETAIL \$ PRICE.

Calculate Order Header Discounts

The system applies any qualifying order header discounts to the order, such as:

- The discount defined in the [Disc %](#) field on the [Work with Order Screen](#).
- The discount defined for the source code on the [Work with Order Screen](#). Use the [Discount %](#) field on the [Create Source Code Screen \(1 of 2\)](#) to define a source discount.

Discount calculation messages: If the calculated order line price is lower than the initial price of the item, the system displays [Discount Calculation Messages](#) when you add the item to the order, indicating the order line number of the discounted item, the offer price (this is initial price of the item), the actual price (this is the discounted price the customer is paying), the dollar amount of the discount, and the discount percentage. For example, if the initial price is \$10.00 and the order line price is \$5.00, the discount calculation message displays as: Line 1:
Offer = 10.00 Actual = 5.00 Discount = 5.00: 50.00%.

Apply Final Customer Price Group Price to Order

After calculating any Order Header discounts for the order, the system applies the final customer price group price to the lines on the order.

The system updates the following fields in the Order Detail table during customer price group line level pricing.

Field	Order Detail Update
ODT Offer Price	The initial price of the item, based on the Price type defined for the customer price group. • If Price type is <i>Original</i>, this is the Original Retail Price from the SKU table. • If Price type is <i>Regular</i>, this is the List Price from the SKU table. You can use this field to determine the initial price of the order line before the system applied any discounts or promotions to the order line.
ODT Original Price	The List price defined for the item/SKU in the SKU table.
ODT Pre-Discount Price	The price of the item after applying the customer price group discount and order header discount. This is the initial price - the customer price group and order header discount; however, if the list price is lower than this price, this is the list price of the item.

Field	Order Detail Update
ODT Price	The final calculated price of the item after applying the customer price group discount and order header discount. This is the initial price - the customer price group and order header discount; however, if the list price is lower than this price, this is the list price of the item. Note: The final price of the order line may update during Customer Price Group Price Code Pricing.
Price Method	The method the system used to calculate the price of an item, but before applying an order-level discount, such as a source code discount percentage. <i>F</i>Customer Price Group displays for lines priced using Customer Price Group Line Level pricing; see the Order Pricing Window for a complete list of price methods. The system uses this value to display the Pricing method on the Work with Order Line Screen (Changing/Adding an Item).

 Important:

The system may reprice the order line during [Customer Price Group Price Code Pricing](#) and [Customer Price Group Best Price Comparison](#). The system performs price code pricing and best price comparison during repricing and end-of-order pricing.

Examples: Line Level Customer Price Group Pricing

- [Example: Original Customer Price Group Line Pricing](#)
- [Example: Regular Customer Price Group Line Pricing](#)
- [Example: Customer Price Group Line Pricing With Customer Price Group Discount](#)
- [Example: Customer Price Group Line Pricing with Order Header Discount](#)
- [Example: Customer Price Group Line Pricing with Customer Price Group and Order Header Discount](#)

Example: Original Customer Price Group Line Pricing

1. Determine the Customer Price Group to Use A customer assigned to customer price group CPGO places an order.

2. Determine the Initial Price of the Item The Price type for customer price group CPGO is set to *Original*, indicating the system uses the Original retail price in the SKU table as the initial price of the item.

The customer adds item ITO to the order. Item ITO has the following prices defined:

- List price of \$25.00
- Original retail price of \$20.00

Since the Price type for customer price group CPGO is set to *Original*, the system uses 20.00 as the initial price of the item.

The customer adds item ITR to the order. Item ITR has the following prices defined:

- List price of \$10.00
- Original retail price of \$15.00

Since the Price type for customer price group CPGO is set to *Original*, the system uses 15.00 as the initial price of the item.

3. Determine the Customer Price Group Discount. The Discountable flag for items ITO and ITR is selected, indicating the items are eligible for customer price group discounting, however, a discount is not defined for customer price group CPGO, so a customer price group discount is not applied to the order.

4. Compare List Price to Order Line Price. The system compares the list price defined for the item to the order line price.

- The list price for item ITO is \$25.00 and the order line price is \$20.00. Since the order line price is lower than the list price, the system retains \$20.00 as the order line price.
- The list price for item ITR is \$10.00 and the order line price is \$15.00. Since the order line price is greater than the list price, the system updates the order line price to \$10.00.

5. Calculate Order Header Discounts. the order does not qualify for any Order Header discounts.

6. Apply Final Customer Price Group Price to Order The system applies the final customer price group price to the lines on the order:

- The order line price for item ITO is \$20.00
- The order line price for item ITR is \$10.00.

Because the calculated order line price for item ITR is lower than the initial price of the item, the system displays [Discount Calculation Messages](#) when you add the item to the order: Line 2: Offer = 15.00 Actual = 10.00 Discount = 5.00 :33.33%

The system updates the Order Detail table with the customer price group line level price.

Field	Item ITO	Item ITR
ODT Offer Price	Initial price: 20.00	Initial price: 15.00
ODT Original Price	List price: 25.00	List price: 10.00
ODT Pre-Discount Price	Price after discounts: 20.00	Price after discounts: 10.00
ODT Price	Order line price: 20.00	Order line price: 10.00
Price Method	F = Customer Price Group.	F = Customer Price Group.

Example: Regular Customer Price Group Line Pricing

1. Determine the Customer Price Group to Use A customer assigned to customer price group CPGR places an order.

2. Determine the Initial Price of the Item The Price type for customer price group CPGR is set to *Regular*, indicating the system uses the List price in the SKU table as the initial price of the item.

The customer adds item ITO to the order. Item ITO has the following prices defined:

- List price of \$25.00
- Original retail price of \$20.00

Since the Price type for customer price group CPGR is set to *Regular*, the system uses 25.00 as the initial price of the item.

The customer adds item ITR to the order. Item ITR has the following prices defined:

- List price of \$10.00
- Original retail price of \$15.00

Since the Price type for customer price group CPGR is set to *Regular*, the system uses 10.00 as the initial price of the item.

3. Determine the Customer Price Group Discount The Discountable flag for items ITO and ITR is selected, indicating the items are eligible for customer price group discounting, however, a discount is not defined for customer price group CPGO, so a customer price group discount is not applied to the order.

4. Compare List Price to Order Line Price The system compares the list price defined for the item to the order line price.

- The list price for item ITO is \$25.00 and the order line price is \$25.00. Since the order line price is equal to the list price, the system retains \$25.00 as the order line price.
- The list price for item ITR is \$10.00 and the order line price is \$10.00. Since the order line price is equal to the list price, the system retains \$10.00 as the order line price.

5. Calculate Order Header Discounts The order does not qualify for any Order Header discounts.

6. Apply Final Customer Price Group Price to Order The system applies the final customer price group price to the lines on the order:

- The order line price for item ITO is \$25.00
- The order line price for item ITR is \$10.00.

The system updates the Order Detail table with the customer price group line level price.

Field	Item ITO	Item ITR
ODT Offer Price	Initial price: 25.00	Initial price: 10.00
ODT Original Price	List price: 25.00	List price: 10.00
ODT Pre-Discount Price	Price after discounts: 25.00	Price after discounts: 10.00
ODT Price	Order line price: 25.00	Order line price: 10.00
Price Method	F = Customer Price Group.	F = Customer Price Group.

Example: Customer Price Group Line Pricing With Customer Price Group Discount

1. Determine the Customer Price Group to Use A customer assigned to customer price group CPGO places an order.

2. Determine the Initial Price of the Item The Price type for customer price group CPGO is set to *Original*, indicating the system uses the Original retail price in the SKU table as the initial price of the item.

The customer adds item ITO to the order. Item ITO has the following prices defined:

- List price of \$25.00
- Original retail price of \$20.00

Since the Price type for customer price group CPGO is set to *Original*, the system uses 20.00 as the initial price of the item.

The customer adds item ITR to the order. Item ITR has the following prices defined:

- List price of \$10.00
- Original retail price of \$15.00

Since the Price type for customer price group CPGO is set to *Original*, the system uses 15.00 as the initial price of the item.

3. Determine the Customer Price Group Discount The Discountable flag for items ITO and ITR is selected, indicating the items are eligible for customer price group discounting. Customer price group CPGO has the following discounts defined:

- 10.00% discount at the Customer Price Group Detail level with an effective date of 1/16/12.
- 30.00% discount at the Customer Price Group Detail level with an effective date of 2/14/12.
- 5.00% discount at the Customer Price Group level.

Because the current date is 2/15/12, the system applies the 30.00% discount to the order.

- Item ITO: initial price \$20.00 - 30.00% = \$14.00.
- Item ITR: initial price \$15.00 - 30.00% = \$10.50.

4. Compare List Price to Order Line Price The system compares the list price defined for the item to the order line price.

- The list price for item ITO is \$25.00 and the order line price is \$14.00. Since the order line price is lower than the list price, the system retains \$14.00 as the order line price.
- The list price for item ITR is \$10.00 and the order line price is \$10.50. Since the order line price is greater than the list price, the system updates the order line price to \$10.00.

5. Calculate Order Header Discounts The order does not qualify for any Order Header discounts.

6. Apply Final Customer Price Group Price to Order The system applies the final customer price group price to the lines on the order:

Because the calculated order line price for item ITO is lower than the initial price of the item, the system displays [Discount Calculation Messages](#) when you add the item to the order: Line 2:Offer = 20.00 Actual = 14.00 Discount = 6.00 :30.00%

Because the calculated order line price for item ITR is lower than the initial price of the item, the system displays [Discount Calculation Messages](#) when you add the item to the order: Line 2:Offer = 15.00 Actual = 10.00 Discount = 5.00 :33.33%

The system updates the Order Detail table with the customer price group line level price.

Field	Item ITO	Item ITR
ODT Offer Price	Initial price: 20.00	Initial price: 15.00
ODT Original Price	List price: 25.00	List price: 10.00
ODT Pre-Discount Price	Price after discounts: 14.00	Price after discounts: 10.00
ODT Price	Order line price: 14.00	Order line price: 10.00
Price Method	F = Customer Price Group.	F = Customer Price Group.

Example: Customer Price Group Line Pricing with Order Header Discount

1. Determine the Customer Price Group to Use A customer assigned to customer price group CPGO places an order.

2. Determine the Initial Price of the Item The Price type for customer price group CPGO is set to *Original*, indicating the system uses the Original retail price in the SKU table as the initial price of the item.

The customer adds item ITO to the order. Item ITO has the following prices defined:

- List price of \$25.00
- Original retail price of \$20.00

Since the Price type for customer price group CPGO is set to *Original*, the system uses 20.00 as the initial price of the item.

The customer adds item ITR to the order. Item ITR has the following prices defined:

- List price of \$10.00
- Original retail price of \$15.00

Since the Price type for customer price group CPGO is set to *Original*, the system uses 15.00 as the initial price of the item.

3. Determine the Customer Price Group Discount The Discountable flag for items ITO and ITR is selected, indicating the items are eligible for customer price group discounting, however, a discount is not defined for customer price group CPGO, so a customer price group discount is not applied to the order.

4. Compare List Price to Order Line Price The system compares the list price defined for the item to the order line price.

- The list price for item ITO is \$25.00 and the order line price is \$20.00. Since the order line price is lower than the list price, the system retains \$20.00 as the order line price.
- The list price for item ITR is \$10.00 and the order line price is \$15.00. Since the order line price is greater than the list price, the system updates the order line price to \$10.00.

5. Calculate Order Header Discounts The order qualifies for a 25% source discount.

The system applies the 25% source discount to the order.

- Item ITO: current order line price \$20.00 - 25.00% = \$15.00.
- Item ITR: current order line price \$10.00 - 25.00% = \$7.50.

6. Apply Final Customer Price Group Price to Order The system applies the final customer price group price to the lines on the order:

Because the calculated order line price for item ITO is lower than the initial price of the item, the system displays [Discount Calculation Messages](#) when you add the item to the order: Line 2:Offer = 20.00 Actual = 15.00 Discount = 5.00 :25.00%

Because the calculated order line price for item ITR is lower than the initial price of the item, the system displays [Discount Calculation Messages](#) when you add the item to the order: Line 2:Offer = 15.00 Actual = 7.50 Discount = 7.50 :50.00%

The system updates the Order Detail table with the customer price group line level price.

Field	Item ITO	Item ITR
ODT Offer Price	Initial price: 20.00	Initial price: 15.00
ODT Original Price	List price: 25.00	List price: 10.00
ODT Pre-Discount Price	Price after discounts: 15.00	Price after discounts: 7.50
ODT Price	Order line price: 15.00	Order line price: 7.50
Price Method	F = Customer Price Group.	F = Customer Price Group.

Example: Customer Price Group Line Pricing with Customer Price Group and Order Header Discount

1. Determine the Customer Price Group to Use A customer assigned to customer price group CPGO places an order.

2. Determine the Initial Price of the Item The Price type for customer price group CPGO is set to *Original*, indicating the system uses the Original retail price in the SKU table as the initial price of the item.

The customer adds item ITO to the order. Item ITO has the following prices defined:

- List price of \$25.00
- Original retail price of \$20.00

Since the Price type for customer price group CPGO is set to *Original*, the system uses 20.00 as the initial price of the item.

The customer adds item ITR to the order. Item ITR has the following prices defined:

- List price of \$10.00
- Original retail price of \$15.00

Since the Price type for customer price group CPGO is set to *Original*, the system uses 15.00 as the initial price of the item.

3. Determine the Customer Price Group Discount The Discountable flag for items ITO and ITR is selected, indicating the items are eligible for customer price group discounting. Customer price group CPGO has the following discounts defined:

- 10.00% discount at the Customer Price Group Detail level with an effective date of 1/16/12.
- 30.00% discount at the Customer Price Group Detail level with an effective date of 2/14/12.
- 5.00% discount at the Customer Price Group level.

Because the current date is 2/15/12, the system applies the 30.00% discount to the order.

- Item ITO: initial price \$20.00 - 30.00% = \$14.00.
- Item ITR: initial price \$15.00 - 30.00% = \$10.50.

4. Compare List Price to Order Line Price The system compares the list price defined for the item to the order line price.

- The list price for item ITO is \$25.00 and the order line price is \$14.00. Since the order line price is lower than the list price, the system retains \$14.00 as the order line price.
- The list price for item ITR is \$10.00 and the order line price is \$10.50. Since the order line price is greater than the list price, the system updates the order line price to \$10.00.

5. Calculate Order Header Discounts The order qualifies for a 25% source discount.

The system applies the 25% source discount to the order.

- Item ITO: current order line price \$14.00 - 25.00% = \$10.50.
- Item ITR: current order line price \$10.00 - 25.00% = \$7.50.

6. Apply Final Customer Price Group Price to Order The system applies the final customer price group price to the lines on the order:

Because the calculated order line price for item ITO is lower than the initial price of the item, the system displays [Discount Calculation Messages](#) when you add the item to the order: Line 2:Offer = 20.00 Actual = 10.50 Discount = 9.50 :47.50%

Because the calculated order line price for item ITR is lower than the initial price of the item, the system displays [Discount Calculation Messages](#) when you add the item to the order: Line 2:Offer = 15.00 Actual = 7.50 Discount = 7.50 :50.00%

The system updates the Order Detail table with the customer price group line level price.

Field	Item ITO	Item ITR
ODT Offer Price	Initial price: 20.00	Initial price: 15.00
ODT Original Price	List price: 25.00	List price: 10.00
ODT Pre-Discount Price	Price after discounts: 10.50	Price after discounts: 7.50
ODT Price	Order line price: 10.50	Order line price: 7.50
Price Method	F = Customer Price Group.	F = Customer Price Group.

Customer Price Group Price Code Pricing

If a customer price group is defined in the [Customer Price Group Code for CPG Pricing Only \(L58\)](#) system control value and the [Price Codes \(D93\)](#) system control value is selected, the system reevaluates the entire order during repricing to find the best price code price to apply to each qualifying order line.

See [When Repricing Occurs](#) for more information on when repricing occurs during interactive order entry.

Source code setting: To do end of order customer price group pricing, the Price method field for the source code on the order header must be set to *Reg Plus Reprice*.



Note:

If the [Customer Price Group Code for CPG Pricing Only \(L58\)](#) system control value does not contain a customer price group code, the system performs [Regular Price Code Pricing](#) instead of Customer Price Group Price Code Pricing.

The system performs the following steps during customer price group price code pricing.

- [Determine Whether the Order Qualifies for a Price Code](#)
- [Apply the Price Code to the Order](#)
- [Apply Discounts and Promotions to the Order](#)

! Important:

Order lines that are assigned to a price code do not qualify for the discount defined for the customer price group assigned to the sold to customer on the order. To apply the customer price group discount to order lines that are assigned to a price code, embed the customer price group discount in the price defined for the price code.

Example: If the customer price group provides a 30% discount, create the price code discount so that it includes the 30% discount.

Determine Whether the Order Qualifies for a Price Code

To qualify for a price code:

#	Step
1.	The date on the Order Header must fall within the Start date and End date defined for the price code in the Price Code table. You can review the start and end dates for price codes on the Work with Price Codes Screen .
2.	The sold to customer on the order must be defined for the price code in the Price Code Customer table. You can review the customers and customer price groups that qualify for a price code on the Work with Qualifying Customer/Price Groups Screen .

**Note:**

If you do not define any sold to customers or customer price groups for a price code, then ALL sold to customers and customer price groups qualify for the price code.

3. The items on the order must be assigned to the price code and meet the price code requirements.
Which items are assigned to the price code? The system looks at the Price Code Details table to determine which items on the order are assigned to the price code. When assigning an item to a price code, you assign the item to the price code by offer or source code. The system uses the source code on the order header to determine whether the item on the order qualifies for the price code.
 - If the item contains SKUs and a SKU is not defined in the Price Code Details table, all SKUs for the item qualify for the price code.
 - If the item contains SKUs and a SKU is defined in the Price Code Details table, only the specified SKUs qualify for the price code.

#	Step
	Price code requirements: The system looks at the Price Code table to determine if the items on the order that are assigned to the price code meet the price code requirements. <i>Quantity required:</i> The total quantity the customer must order of all qualifying items to get the price break. Note: The system evaluates price code quantity by ship-to address. <i>Allow multiples?</i> • <i>Unselected</i> = Once an order qualifies for the price code based on the price code quantity requirement, the system applies the price code discount to all qualifying items on the order that are not already assigned to a price code. • <i>Selected</i> = Once an order qualifies for the price code based on the price code quantity requirement, the remaining items on the order that are not already assigned to a price code must meet the price code quantity requirement again in order to qualify for the price code. The Distinct By setting defines how the system determines whether the order meets the price code multiple requirement. <i>Distinct By:</i> • <i>Blank</i> = The order must meet the price code quantity requirement again in order to qualify. <i>Example:</i> If the Quantity required is 3, the order must contain three items/SKUs defined for the price code in order to qualify. If the order contains 7 items that qualify, the system applies the price code to 6 of the items. • <i>Item</i> = The quantity requirement for the price code requires separate <i>items</i> in order to qualify. <i>Example:</i> If the Quantity required is 3, the order must contain three separate items defined for the price code in order to qualify. • <i>SKU</i> = The quantity requirement for the price code requires separate <i>SKUs</i> in order to qualify. <i>Example:</i> If the Quantity required is 3, the order must contain three separate SKUs defined for the price code in order to qualify. • <i>Category</i> = The quantity requirement for the price code requires separate <i>item categories</i> in order to qualify. <i>Example:</i> If the Quantity required is 3, the order must contain three separate item categories for the items defined for the price code in order to qualify. See Examples: Customer Price Group Price Code Pricing for examples of how price codes are applied to an order based on the price code requirements.

Apply the Price Code to the Order

You can apply only one price code to an order line.

Best way price code hierarchy: If an order qualifies for more than one price code and you are using *Customer Price Group Price Code Pricing*, the system calculates the discount that each price code provides and:

1. Applies the price code that provides the greatest discount to the qualifying items on the order.
2. If more than one price code offers the same discount, the system uses the price code with the lowest Sequence number.
3. If more than one price code has the same sequence number, the system uses the price code with the lowest numeric price code.

The system applies the price code to the lines on an order in ascending price, order line number sequence.

Once you apply a price code to an order line, it no longer qualifies for another price code.

Starting price: When calculating the price code discount, the system starts with the initial price defined for the order line. This is the price of the item determined during [Line Level Customer Price Group Pricing](#) and stored in the ODT Price field.

After the system applies the first price code to the order, the system reevaluates the order to determine if it qualifies for another price code. The system applies the next price code that provides the greatest discount to the order in ascending price, order line number sequence.

The system continues to apply price codes to the order, using the best way price code hierarchy, in ascending price, order line number sequence, until all of the eligible lines on the order are assigned to a price code.

Applying a price code to a portion of an order line: To easily determine the price code discount applied to the lines on an order, enter each order line for a quantity of 1. If an order line contains a quantity greater than 1 and only part of the quantity on the order line qualifies for the discount, the system applies the discount to the quantity that qualifies for the discount and leaves the remaining quantity on the order line at its initial price. The extended price of the order line represents the discounted quantity price + the non-discounted quantity price.

Partial price code line example: An order line qualifies for a price code discount: \$3.00 off 2. The Multiples field is selected for the price code, indicating the order must meet the price code requirement again to apply the price code to the order multiple times. The order line quantity is 3 with a unit price of 10.00. The system applies the price code discount to 2 units of the item ($10.00 - 3.00 = 7.00$). The third unit remains priced at 10.00. The extended price for the order line is 24.00 ($7.00 + 7.00 + 10.00$) and the unit price for the order line is 8.00 ($24.00 / 3$).

**Note:**

There may be a rounding discrepancy if the extended price of an order line does not divide evenly by the order quantity. This discrepancy should be no more than a few pennies. *Example:* Change the discount in the example above from \$3.00 off 2 to \$2.00 off 2. The order line quantity is 3 with a unit price of 10.00. The system applies the price code discount to 2 units of the item ($10.00 - 2.00 = 8.00$). The third unit remains priced at 10.00. The extended price for the order line is 26.01 and the unit price is 8.67 ($26.00 / 3 = 8.666$, which rounds to 8.67; $8.67 + 8.67 + 8.67 = 26.01$).

Price method: The system updates the Price method for any order line whose price was updated during customer price group price code pricing to *E* Price Code.

Order lines not eligible for price code discounts:

- Price code repricing does not apply to manually priced order lines associated with a price override reason code.
- Order lines that are assigned to the price override reason code defined in the [Price Override Reason Code for CPG Pricing \(L59\)](#) system control value cannot be further discounted except by order-level coupons or source% discounts. However, the system includes the dollar amount and quantity for order lines assigned to the Customer Price Group price override reason code in the eligibility calculations as qualifiers for promotions and price code pricing that may apply to other items on the order.

Apply Discounts and Promotions to the Order

Discounts and promotions: Once the system completes customer price group price code pricing, the system applies any non-freight discounts, detail-level coupon promotions, and any other promotions to the lines on the order.

Determining the best price: If the [Best Price Comparison](#) field for the customer price group assigned to the sold to customer is *selected*, the system performs [Customer Price Group Best Price Comparison](#) to determine if the customer price group defined in the Customer Price

Group Code for CPG Pricing Only (L58) system control value provides a better price than the customer price group assigned to the sold to customer on the order.

Order-level coupon promotions: When using customer price group pricing, the system applies order-level coupon promotions, as defined in [Working with Coupon Promotions \(WCPR\)](#), as the last discount applied to the lines on the order. See [Order-Level Coupon Promotions when using Customer Price Group Pricing](#) for further details.

Examples: Customer Price Group Price Code Pricing

- [Example: Price Code Special Price Discount](#)
- [Example: Price Code Dollar Off Discount](#)
- [Example: Price Code Percent Off Discount](#)
- [Example: Price Code Group Price Discount](#)
- [Example: Applying Multiple Price Codes to the Order](#)
- [Example: Item Qualifies for More than One Price Code](#)
- [Example: Price Code Multiples and Distinct By](#)

Example: Price Code Special Price Discount

On 2/17/12, you take an order for sold to customer 10 using source code 7.

Line#	Item	Quantity	Price
1	A1	1	\$10.00
2	B1	2	\$20.00
3	C1	3	\$30.00
4	D1	4	\$40.00

Determine eligible price codes: The date on the Order Header falls within the date range for the following price codes in the Price Code table:

Price Code	Seq	Start	End	Qty	Type of Price Code Discount
101	4	2/1/12	4/1/12	1	<i>Dollar off: \$2 off 1</i>
202	3	2/1/12	4/1/12	2	<i>Percent off: 10% off 2</i>
303	2	2/1/12	4/1/12	3	<i>Special price: \$20.00 each for 3</i>
404	1	2/1/12	4/1/12	3	<i>Group price: \$60.00 total for 3</i>

Determine price code customer assignment: The sold to customer on the order qualifies for the following price code in the Price Code Customer table:

Price Code	Customer#	Customer Price Group
303	10	

Determine price code item assignment: The item on the order that qualifies for price code 303 in the Price Code Details table is:

Price Code	Item	SKU	Source Code
303	C1		7

Reprice the order: When you select *Reprice* at the Order Detail screen, the system reprices as follows:

Line#	Item	Initial Price	Price Code	Reprice
1	A1	\$10.00	none	Price remains \$10.00
2	B1	\$20.00	none	Price remains \$20.00
3	C1	\$30.00	303	Special price: \$20.00 each for 3 Price changes from \$30.00 to \$20.00
4	D1	\$40.00	none	Price remains \$40.00

Because the calculated order line price for item C1 is lower than the initial price of the item, the system displays *Discount Calculation Messages* when you reprice the order: Line 3: Offer = 30.00 Actual = 20.00 Discount = 10.00 :33.33%

Example: Price Code Dollar Off Discount

On 2/17/12, you take an order for sold to customer 10 using source code 7.

Line#	Item	Quantity	Price
1	A1	1	\$10.00
2	B1	2	\$20.00
3	C1	3	\$30.00
4	D1	4	\$40.00

Determine eligible price codes: The date on the Order Header falls within the date range for the following price codes in the Price Code table:

Price Code	Seq	Start	End	Qty	Type of Price Code Discount
101	4	2/1/12	4/1/12	1	<i>Dollar off:</i> \$2 off 1
202	3	2/1/12	4/1/12	2	<i>Percent off:</i> 10% off 2
303	2	2/1/12	4/1/12	3	<i>Special price:</i> \$20.00 each for 3
404	1	2/1/12	4/1/12	3	<i>Group price:</i> \$60.00 total for 3

Determine price code customer assignment: The sold to customer on the order qualifies for the following price code in the Price Code Customer table:

Price Code	Customer#	Customer Price Group
101	10	

Determine price code item assignment: The item on the order that qualifies for price code 101 in the Price Code Details table is:

Price Code	Item	SKU	Source Code
101	A1		7

Reprice the order: When you select *Reprice* at the Order Detail screen, the system reprices as follows:

Line#	Item	Initial Price	Price Code	Reprice
1	A1	\$10.00	101	Dollar off: \$2.00 off 1 Price changes from \$10.00 to \$8.00
2	B1	\$20.00	none	Price remains \$20.00
3	C1	\$30.00	none	Price remains \$30.00
4	D1	\$40.00	none	Price remains \$40.00

Because the calculated order line price for item A1 is lower than the initial price of the item, the system displays [Discount Calculation Messages](#) when you reprice the order: Line 1: Offer = 10.00 Actual = 8.00 Discount = 2.00 :20.00%

Example: Price Code Percent Off Discount

On 2/17/12, you take an order for sold to customer 10 using source code 7.

Line#	Item	Quantity	Price
1	A1	1	\$10.00
2	B1	2	\$20.00
3	C1	3	\$30.00
4	D1	4	\$40.00

Determine eligible price codes: The date on the Order Header falls within the date range for the following price codes in the Price Code table:

Price Code	Seq	Start	End	Qty	Type of Price Code Discount
101	4	2/1/12	4/1/12	1	Dollar off: \$2 off 1
202	3	2/1/12	4/1/12	2	Percent off: 10% off 2
303	2	2/1/12	4/1/12	3	Special price: \$20.00 each for 3
404	1	2/1/12	4/1/12	3	Group price: \$60.00 total for 3

Determine price code customer assignment: The sold to customer on the order qualifies for the following price code in the Price Code Customer table:

Price Code	Customer#	Customer Price Group
202	10	

Determine price code item assignment: The item on the order that qualifies for price code 202 in the Price Code Details table is:

Price Code	Item	SKU	Source Code
202	B1		7

Reprice the order: When you select *Reprice* at the Order Detail screen, the system reprices as follows:

Line#	Item	Initial Price	Price Code	Reprice
1	A1	\$10.00	none	Price remains \$10.00
2	B1	\$20.00	202	Percent off: 10% off 2 Price changes from \$20.00 to 18.00
3	C1	\$30.00	none	Price remains \$30.00
4	D1	\$40.00	none	Price remains \$40.00

Because the calculated order line price for item A1 is lower than the initial price of the item, the system displays *Discount Calculation Messages* when you reprice the order: Line 2:Offer = 20.00 Actual = 18.00 Discount = 2.00 :10.00%

Example: Price Code Group Price Discount

On 2/17/12, you take an order for sold to customer 10 using source code 7.

Line#	Item	SKU	Quantity	Price
1	SKA	RED	1	\$40.00
2	SKB	BLUE	1	\$20.00
3	SKC	GRN	1	\$30.00
4	SKD	GREY	1	\$40.00

Determine eligible price codes: The date on the Order Header falls within the date range for the following price codes in the Price Code table:

Price Code	Seq	Start	End	Qty	Type of Price Code Discount
101	4	2/1/12	4/1/12	1	<i>Dollar off:</i> \$2 off 1
202	3	2/1/12	4/1/12	2	<i>Percent off:</i> 10% off 2
303	2	2/1/12	4/1/12	3	<i>Special price:</i> \$20.00 each for 3
404	1	2/1/12	4/1/12	3	<i>Group price:</i> \$60.00 total for 3

Determine price code customer assignment: The sold to customer on the order qualifies for the following price code in the Price Code Customer table:

Price Code	Customer#	Customer Price Group
404	10	

Determine price code item assignment: The items on the order that qualify for price code 404 in the Price Code Details table are:

Price Code	Item	SKU	Source Code
404	SKA		7
404	SKB		7
404	SKC		7
404	SKD		7

**Note:**

If an item contains SKUs and no SKUs are defined for the item in the Price Code Details table, all SKUs for the item qualify for the price code.

Reprice the order: When you select *Reprice* at the Order Detail screen, the system reprices in ascending price, order line number sequence

Line#	Item	SKU	Initial Price	Price Code	Reprice
2	SKB	BLUE	\$20.00	404	Group price: \$60.00 total for 3 Price changes from \$20.00 to \$13.33
3	SKC	GRN	\$30.00	404	Group price: \$60.00 total for 3 Price changes from \$30.00 to \$20.00
1	SKA	RED	\$40.00	404	Group price: \$60.00 total for 3 Price changes from \$40.00 to \$26.67
4	SKD	GREY	\$40.00	none	Price remains \$40.00

merchandise total for lines assigned to price code 404 = \$90.00

\$90.00 merchandise total - \$60.00 group price = \$30.00 discount amount to prorate

**Note:**

Order line 4 does not qualify for the price code 404 discount because you must order the qualifying items in groups of 3. If the customer ordered 2 more qualifying items, the order would qualify for the price code 404 discount two times because it would have two qualifying groups of 3 on the order.

Prorating the Group Price

The system applies the group price discount to each qualifying order line on a pro-rata basis.

Order line 2 calculations:

20.00 extended amount of the detail line before applying discounts / 90.00 discountable order merchandise total = .2222 discount percentage

20.00 pre-discount unit price of the detail line - [(30.00 total discount amount to prorate * .2222 discount percentage from above calculation) / 1 line unit quantity] = 13.33 unit selling price

Order line 3:

30.00 extended amount of the detail line before applying discounts / 90.00 discountable order merchandise total = .3333 discount percentage

30.00 pre-discount unit price of the detail line - [(30.00 total discount amount to prorate * .3333 discount percentage from above calculation) / 1 line unit quantity] = 20.00 unit selling price

Order line 1:

40.00 extended amount of the detail line before applying discounts / 90.00 discountable order merchandise total = .4444 discount percentage

40.00 pre-discount unit price of the detail line - [(30.00 total discount amount to prorate * .4444 discount percentage from above calculation) / 1 line unit quantity] = 26.67 unit selling price

Discount message: Because the calculated order line price for lines 1-3 is lower than the initial price of the item, the system displays *Discount Calculation Messages* when you reprice the order: Line 3:Offer = 30.00 Actual = 20.00 Discount = 10.00 :33.33%

Example: Applying Multiple Price Codes to the Order

On 2/17/12, you take an order for sold to customer 10 using source code 7.

Line#	Item	Quantity	Price
1	A1	1	\$10.00
2	B1	2	\$20.00
3	C1	3	\$30.00
4	D1	3	\$40.00

Determine eligible price codes: The date on the Order Header falls within the date range for the following price codes in the Price Code table:

Price Code	Seq	Start	End	Qty	Type of Price Code Discount
101	4	2/1/12	4/1/12	1	<i>Dollar off: \$2 off 1</i>
202	3	2/1/12	4/1/12	2	<i>Percent off: 10% off 2</i>
303	2	2/1/12	4/1/12	3	<i>Special price: \$20.00 each for 3</i>
404	1	2/1/12	4/1/12	3	<i>Group price: \$60.00 total for 3</i>

Determine price code customer assignment: The sold to customer on the order qualifies for the following price codes in the Price Code Customer table:

Price Code	Customer#
101	10
202	10
303	10
404	10

Determine price code item assignment: The details in the Price Code Details table for the items on the order are:

Price Code	Item	Source Code
101	A1	7
202	B1	7
303	C1	7
404	D1	7

Reprice the order: When you select *Reprice* at the Order Detail screen, the system reprices as follows:

Line#	Item	Initial Price	Price Code	Reprice
1	A1	\$10.00	101	Dollar off: \$2 off 1 Price changes from \$10.00 to \$8.00
2	B1	\$20.00	202	Percent off: 10% off 2 Price changes from \$20.00 to 18.00
3	C1	\$30.00	303	Special price: \$20.00 each for 3 Price changes from \$30.00 to \$20.00
4	D1	\$40.00	404	Group price: \$60.00 total for 3 Price changes from \$40.00 to \$20.00

Example: Item Qualifies for More than One Price Code

On 2/17/12, you take an order for sold to customer 10 using source code 7.

Line#	Item	SKU	Quantity	Price
1	SKA	RED	1	\$40.00
2	SKA	BLUE	1	\$40.00
3	SKB	GRN	1	\$20.00
4	SKC	GREY	1	\$30.00
5	SKD	BLCK	1	\$40.00

Determine eligible price codes: The date on the Order Header falls within the date range for the following price codes in the Price Code table:

Price Code	Seq	Start	End	Qty	Type of Price Code Discount
101	4	2/1/12	4/1/12	1	<i>Dollar off: \$2 off 1</i>
202	3	2/1/12	4/1/12	2	<i>Percent off: 10% off 2</i>
404	1	2/1/12	4/1/12	3	<i>Group price: \$60.00 total for 3</i>

Determine price code customer assignment: The sold to customer on the order qualifies for the following price codes in the Price Code Customer table:

Price Code	Customer#
101	10
202	10
404	10

Determine price code item assignment: The details in the Price Code Details table for the items on the order are:

Price Code	Item	Source Code
101	SKA	7
101	SKB	7
101	SKC	7
101	SKD	7

Price Code	Item	Source Code
202	SKA	7
202	SKB	7
202	SKC	7
202	SKD	7
404	SKA	7
404	SKB	7
404	SKC	7
404	SKD	7

**Note:**

If an item contains SKUs and no SKUs are defined for the item in the Price Code Details table, all SKUs for the item qualify for the price code.

**Important:**

You can apply only one price code to an order line. If an order line qualifies for more than one price code and you are using *Customer Price Group Price Code Pricing*, the system uses the price code that provides the greatest discount. If more than one price code offers the same discount, the system uses the price code with the lowest Sequence number. If more than one price code has the same sequence number, the system uses the price code with the lowest numeric price code.

Reprice the order: When you select *Reprice* at the Order Detail screen, the system reprices the lines on the order in ascending price, order line number sequence.

Of the price codes that were eligible to apply to the order, price code 404 provided the greatest discount. Because the Multiples field for price code 404 was selected, only the first 3 order lines in ascending price, order line number sequence were eligible for the price code; the remaining order lines did not meet the quantity requirement for price code 404. The system assigned the next price code with the greatest discount (price code 202) to the two remaining items on the order.

The system applies price code 404 to order lines 3, 4 and 1. See [Prorating the Group Price](#) for the calculations the system uses to determine the price of each order line assigned to the group price.

Line#	Item	SKU	Initial Price	Price Code	Reprice
3	SKB	GRN	\$20.00	404	Group price: \$60.00 total for 3 Price changes from \$20.00 to \$13.33
4	SKC	GREY	\$30.00	404	Group price: \$60.00 total for 3 Price changes from \$30.00 to \$20.00

Line#	Item	SKU	Initial Price	Price Code	Reprice
1	SKA	RED	\$40.00	404	Group price: \$60.00 total for 3 Price changes from \$40.00 to \$26.67 The system applies price code 202 to order lines 2 and 5:
2	SKA	BLUE	\$40.00	202	Percent off: 10% off 2 Price changes from \$40.00 to 36.00
5	SKD	BLCK	\$40.00	202	Percent off: 10% off 2 Price changes from \$40.00 to 36.00

Discount message: Because the calculated order line price for the order lines is lower than the initial price of the item, the system displays *Discount Calculation Messages* when you reprice the order: Line 4:Offer = 30.00 Actual = 20.00 Discount = 10.00 :33.33%

Example: Price Code Multiples and Distinct By

On 2/17/12, you take an order for sold to customer 10 using source code 7.

Line#	Item	SKU	Item Category	Qty	Price
1	SKA	SML	A	1	\$10.00
2	SKA	SML	A	1	\$10.00
3	SKB	SML	B	1	\$10.00
4	SKC	SML	C	1	\$10.00
5	SKD	SML	D	1	\$10.00
6	SKD	MED	D	1	\$10.00
7	SKD	LRG	D	1	\$10.00

Determine eligible price codes: The order and customer qualify for price code 202 in the Price Code table:

Price Code	Seq	Start	End	Qty	Price Code Discount
202	3	2/1/12	4/1/12	2	Percent off: 10% off 2

Determine price code item assignment: The details in the Price Code Details table for the items on the order are:

Price Code	Item	Source Code
202	SKA	7
202	SKB	7
202	SKC	7
202	SKD	7

Reprice the order: When you select *Reprice* at the Order Detail screen, the system reprices the lines on the order in ascending price, order line number sequence.

- [Multiples Unselected](#)
- [Multiples Selected, Distinct By Blank](#)
- [Multiples Selected, Distinct By Item](#)
- [Multiples Selected, Distinct By SKU](#)
- [Multiples Selected, Distinct By Item Category](#)

Multiples Unselected

Because Multiples for price code 202 is unselected, once the order qualifies for the price code based on the price code quantity requirement, the system applies price code 202 to all qualifying items on the order that are not already assigned to a price code.

Line#	Item	SKU	Initial Price	Price Code	Reprice
					The system applies price code 202 to order lines 1 and 2:
1	SA	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
2	SA	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
					Now that the order qualifies for price code 202, the system applies price code 202 to all qualifying items on the order that are not already assigned to a price code:
3	SB	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
4	SC	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
5	SD	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
6	SD	MED	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
7	SD	LRG	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00

Multiples Selected, Distinct By Blank

Because Multiples for price code 202 is selected and the Distinct By is blank, the order must meet the price code quantity requirement again in order to qualify.

Line#	Item	SKU	Initial Price	Price Code	Reprice
					The system applies price code 202 to order lines 1 and 2:
1	SA	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00

Line#	Item	SKU	Initial Price	Price Code	Reprice
2	SA	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 The system then applies price code 202 to order lines 3 and 4:
3	SB	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
4	SC	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 The system then applies price code 202 to order lines 5 and 6:
5	SD	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
6	SD	MED	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 Order line 7 does not qualify since it does not meet the price code quantity requirement of 2.
7	SD	LRG	\$10.00	none	Remains \$10.00

Multiples Selected, Distinct By Item

Because Multiples for price code 202 is selected and the Distinct By is *Item*, the price code requires separate items in the required quantity in order to qualify.

Line#	Item	SKU	Initial Price	Price Code	Reprice
					The system applies price code 202 to order lines 1 and 3:
1	SA	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
3	SB	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 The system then applies price code 202 to order lines 2 and 4:
2	SA	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
4	SC	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 Order lines 5, 6 and 7 do not qualify for price code 202 since they do not meet the price code quantity requirement of 2 by item.
5	SD	SML	\$10.00	none	Remains \$10.00
6	SD	MED	\$10.00	none	Remains \$10.00
7	SD	LRG	\$10.00	none	Remains \$10.00

Multiples Selected, Distinct By SKU

Because Multiples for price code 202 is selected and the Distinct By is *SKU*, the price code requires separate SKUs in the required quantity in order to qualify.

Line#	Item	SKU	Initial Price	Price Code	Reprice
1	SA	SML	\$10.00	202	The system applies price code 202 to order lines 1 and 3: Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
3	SB	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 The system then applies price code 202 to order lines 2 and 4:
2	SA	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
4	SC	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 The system then applies price code 202 to order lines 5 and 6:
5	SD	SML	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
6	SD	MED	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 Order line 7 does not qualify since it does not meet the price code quantity requirement of 2 by SKU.
7	SD	LRG	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00

Multiples Selected, Distinct By Item Category

Because Multiples for price code 202 is selected and the Distinct By is *Item Category*, the price code requires separate item categories in the required quantity in order to qualify.

Line	Item	SKU	Category	Initial Price	Price Code	Reprice
1	SA	SML	A	\$10.00	202	The system applies price code 202 to order lines 1 and 3: Percent off: 10% off 2 Price changes from \$10.00 to \$9.00
3	SB	SML	B	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 The system then applies price code 202 to order lines 2 and 4:
2	SA	SML	A	\$10.00	none	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00

Line	Item	SKU	Category	Initial Price	Price Code	Reprice
4	SC	SML	C	\$10.00	202	Percent off: 10% off 2 Price changes from \$10.00 to \$9.00 Order lines 5, 6 and 7 do not qualify for price code 202 since they do not meet the price code quantity requirement of 2 by item category.
5	SD	SML	D	\$10.00	none	Remains \$10.00
6	SD	MED	D	\$10.00	none	Remains \$10.00
7	SD	LRG	D	\$10.00	none	Remains \$10.00

Customer Price Group Best Price Comparison

After performing [Customer Price Group Price Code Pricing](#) and applying any non-freight discounts and promotions (and before applying any freight promotions and order-level coupon promotions), the system looks at the [Best Price Comparison](#) field for the customer price group assigned to the sold to customer to determine whether to perform customer price group best price comparison processing.

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

- If the Best Price Comparison field for the customer price group assigned to the sold to customer is unselected, the system does not perform customer price group best price comparison.
- If the Best Price Comparison field for the customer price group assigned to the sold to customer is selected, the system performs customer price group best price comparison.

During customer price group best price comparison, the system:

1. Performs [Line Level Customer Price Group Pricing](#) for the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value.
2. Performs [Customer Price Group Price Code Pricing](#) for the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value.
3. Calculates the non-freight discounts, line-level coupon promotions, and any other promotions that are eligible for the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value.
4. Compares the price available for the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value to the price available for the customer price group assigned to the sold to customer on the order.
5. If the calculated price for the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value is *lower* than the calculated price for the customer price group assigned to the sold to customer on the order, the system updates the order line to this lower price.
6. If the calculated price for the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value is *greater* than the calculated price

for the customer price group assigned to the sold to customer on the order, the system does not update the price on the order line.

7. After applying the best price to each order line, the system applies any freight discounts and order-level coupon promotions to the order; see [Order-Level Coupon Promotions when using Customer Price Group Pricing](#).

Manually entered promotions: If the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value is eligible for a promotion that requires manual entry to be applied to the order, the system includes this promotion in the best price comparison only if the promotion code is manually entered on the order.

Free gifts:

- If the sold to customer or order qualifies for a free gift, and after performing best price comparison, the dollar total no longer makes the order qualify, the system will not remove the free gift from the order.
- If the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value qualifies for a free gift, the system will NOT add the item to the order during customer price group best price comparison.

Price method: The system updates the Price method for any order line whose price was updated during customer price group best price comparison to *J Repriced Customer Price Group Best Price*.

Order transaction history: The system writes an order transaction history message indicating the order line was repriced during customer price group best price comparison; for example:.

Type	Transaction Note	Amount	User
UPSELL PROMO	Best Price price override - Line 2	24.99	TBROWN

Order Detail table: The system stores the calculated price for the default customer price group in the following fields in the Order Detail table.

- Basic customer price
- Basic customer prediscount price
- Basic customer original price: The final calculated price of the order line for the customer price group code defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value.
- Customer price group original price: The final calculated price of the order line for the customer price group code assigned to the sold to customer on the order.
- Basic customer price method

The system compares the Basic customer original price to the Customer price group original price to determine whether the default customer price group provides a better price than the customer price group assigned to the sold to customer on the order.

Order-Level Coupon Promotions when using Customer Price Group Pricing

When using customer price group pricing, the system applies order-level coupon promotions, as defined in [Working with Coupon Promotions \(WCPR\)](#), as the last discount applied to the lines on the order.

- The system applies order-level coupon promotions after applying all other discounts and promotions to the lines on the order, and after performing *Customer Price Group Best Price Comparison*.

- When applying order-level coupon promotions to the lines on the order, the system applies the coupons to the order as a pro-rated merchandise discount during repricing.
- The system applies the coupon promotion to all lines eligible for the coupon promotion, including non-discountable items.

Customer price group order-level coupon discount calculations: The system uses the following calculations to determine the discount amount to apply to each order line.

The system calculates the Discount Percentage for each order line:

order line extended amount after applying all other discounts and promotions and best price / order merchandise total = discount percentage

The system calculates the Unit Selling Price for each order line:

order line post-discount unit price - [(total order-level coupon amount X discount % from above calculation) / line unit quantity] = unit selling price

For more information: See:

- [How Coupons Work](#) for more information on coupon promotions.
- [Example: Line Level Best Price Comparison](#) and [Example: Price Code Best Price Comparison](#) for examples that apply order-level coupons to an order.

Examples: Customer Price Group Best Price Comparison

- [Example: Line Level Best Price Comparison](#)
- [Example: Price Code Best Price Comparison](#)

Example: Line Level Best Price Comparison

1. [Determine the Customer Price Group to Use](#). A customer assigned to customer price group CPGO places an order. The Best Price Comparison field for customer price group CPGO is *selected*, indicating the system uses the best price offered between customer price group CPGO and the default customer price group, CPG, defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value.

2. [Determine the Initial Price of the Item](#)

- The Price type for customer price group CPGO is set to *Original*, indicating the system uses the Original retail price in the SKU table as the initial price of the item.
- The Price type for customer price group CPG is set to *Regular*, indicating the system uses the List price in the SKU table as the initial price of the item.

The customer adds item ITO to the order. Item ITO has the following prices defined:

- List price of \$25.00
- Original retail price of \$20.00

CPGO customer price group	CPG customer price group
Since the Price type for customer price group CPGO is set to <i>Original</i> , the system uses 20.00 as the initial price of the item.	Since the Price type for customer price group CPG is set to <i>Regular</i> , the system uses \$25.00 as the initial price of the item.

The customer adds item ITR to the order. Item ITR has the following prices defined:

- List price of \$10.00

- Original retail price of \$15.00

CPGO customer price group	CPG customer price group
Since the Price type for customer price group CPGO is set to <i>Original</i> , the system uses 15.00 as the initial price of the item.	Since the Price type for customer price group CPG is set to <i>Regular</i> , the system uses \$10.00 as the initial price of the item.

3. **Determine the Customer Price Group Discount.** The Discountable flag for items ITO and ITR is selected, indicating the items are eligible for customer price group discounting.

CPGO customer price group	CPG customer price group
Customer price group CPGO provides a 30.00% discount. Item ITO: initial price \$20.00 - 30.00% = \$14.00. Item ITR: initial price \$15.00 - 30.00% = \$10.50.	Customer price group CPG provides a 25.00% discount. Item ITO: initial price \$25.00 - 25.00% = \$18.75. Item ITR: initial price \$10.00 - 25.00% = \$7.50.

4. **Compare List Price to Order Line Price.** The system compares the list price defined for the item to the order line price.

CPGO customer price group	CPG customer price group
The list price for item ITO is \$25.00 and the order line price is \$14.00. Since the order line price is lower than the list price, the system retains \$14.00 as the order line price. The list price for item ITR is \$10.00 and the order line price is \$10.50. Since the order line price is greater than the list price, the system updates the order line price to \$10.00.	The list price for item ITO is \$25.00 and the order line price is \$18.75. Since the order line price is lower than the list price, the system retains \$18.75 as the order line price. The list price for item ITR is \$10.00 and the order line price is \$7.50. Since the order line price is lower than the list price, the system retains \$7.50 as the order line price.

5. **Calculate Order Header Discounts.** The order qualifies for a 25% source discount.

The system applies the 25% source discount to the order.

CPGO customer price group	CPG customer price group
Item ITO: current order line price \$14.00 - 25.00% = \$10.50. Item ITR: current order line price \$10.00 - 25.00% = \$7.50.	Item ITO: current order line price \$18.75 - 25.00% = \$14.06. Item ITR: current order line price \$7.50 - 25.00% = \$5.62.

6. **Apply Final Customer Price Group Price to Order.** The system applies the final customer price group price for the customer price group CPGO assigned to the sold to customer to the lines on the order:



Note:

Before you reprice the order, the final calculated line level price for the customer price group assigned to the sold to customer on the order displays for each order line. The system does not apply the best price to the each order line until you reprice the order.

Because the calculated order line price for item ITO is lower than the initial price of the item, the system displays [Discount Calculation Messages](#) when you add the item to the order: Line 2:Offer = 20.00 Actual = 10.50 Discount = 9.50 :47.50%

Because the calculated order line price for item ITR is lower than the initial price of the item, the system displays [Discount Calculation Messages](#) when you add the item to the order: Line 2:Offer = 15.00 Actual = 7.50 Discount = 7.50 :50.00%

The system updates the Order Detail table with the customer price group line level price.

Field	Item ITO	Item ITR
ODT Offer Price	Initial price: 20.00	Initial price: 15.00
ODT Original Price	List price: 25.00	List price: 10.00
ODT Pre-Discount Price	Price after discounts: 10.50	Price after discounts: 7.50
ODT Price	Order line price: 10.50	Order line price: 7.50
Price Method	F = Customer Price Group	F = Customer Price Group
Basic Customer Price	default customer price group price after discounts: 14.06	default customer price group price after discounts: 5.62
Basic Customer Prediscount Price	14.06	5.62
Basic Customer Original Price	final default customer price group price: 14.06	final default customer price group price: 5.62
Customer Price Group Original Price	final sold to customer price group discount: 10.50	final sold to customer price group discount: 7.50

When you select *Reprice*, the system:

- applies any non-freight discounts, detail-level coupon promotions, and any other promotions to the lines on the order. The offer associated with the order has a free gift defined for a merchandise total of \$18.00. Because the merchandise total for the order before performing best price comparison is \$18.00 (\$10.50 + \$7.50), the system adds the free gift to the order.
- compares the prices offered by the customer price group assigned to the sold to customer on the order to the prices offered by the default customer price group and updates the lines on the order to the lowest price offered.

CPGO customer price group	CPG customer price group
Item ITO: final calculated price is \$10.50.	Item ITO: final calculated price is \$14.06.
Item ITR: final calculated price is \$7.50.	Item ITR: final calculated price is \$5.62.

Results:

- Item ITO: The final price for sold to customer price group CPGO \$10.50 is lower than the final price for the default customer price group CPG \$14.06. The system retains \$10.50 as the final price.
- Item ITR: The final price for sold to customer price group CPGO \$7.50 is greater than the final price for the default customer price group CPG \$5.62. The system updates this order line to \$5.62.

8. *Apply Order-Level Coupon Promotions to the Order.* The order qualifies for an order-level coupon that provides \$5.00 off the order.

The system applies the \$5.00 order-level coupon discount to each order line on a pro-rata basis. The merchandise total after applying all other discounts and promotions and determining the best price is \$16.12 (10.50 + 5.62).

The system uses the following calculations to determine the discount amount to apply to each order line.

The system calculates the Discount Percentage for each order line:

order line extended amount after applying all other discounts and promotions and best price / order merchandise total = discount percentage

Line 1: $10.50 / 16.12 = .65136$

Line 2: $5.62 / 16.12 = .3486$

The system calculates the Unit Selling Price for each order line:

order line post-discount unit price - [(total order-level coupon amount X discount % from above calculation) / line unit quantity] = unit selling price

Line 1: $10.50 - [(5.00 \times .65136) / 1] = \$7.24$

Line 2: $5.62 - [(5.00 \times .3486) / 1] = \$3.88$

 Note:

Even though the merchandise total after performing best price comparison and applying any order-level coupons to the order is now \$11.12 (while the offer free gift required a merchandise total of \$18.00), the system retains the offer free gift that was added to the order.

Order Detail table updates: The system updates the Order Detail table after repricing the order.

Field	Item ITO	Item ITR
ODT Offer Price	Initial price: 20.00	Initial price: 15.00
ODT Original Price	List price: 25.00	List price: 10.00
ODT Pre-Discount Price	Price before reprice: 10.50	Price before reprice: 7.50
ODT Price	Order line price: 7.24	Order line price: 3.88
Price Method	<i>F</i> = Customer Price Group	<i>J</i> = Repriced CPG Best Price
Basic Customer Price	default customer price group price after discounts: 10.49	default customer price group price after discounts: 4.19
Basic Customer Prediscount Price	14.06	5.62
Basic Customer Original Price	default customer price group price before applying order-level coupon: 14.06	default customer price group price before applying order-level coupon: 5.62
Customer Price Group Original Price	sold to customer price group discount before applying order-level coupon: 10.50	sold to customer price group discount before applying order-level coupon: 7.50
Basic Customer Price Method	<i>A</i> = Repriced-prorated discount	<i>F</i> = Customer Price Group

Example: Price Code Best Price Comparison

Determine customer price group: You take an order for sold to customer 10 using source code 7. Sold to customer 10 is assigned to customer price group *CPGO*. The Best Price Comparison field for customer price group *CPGO* is selected.

Line#	Item	SKU	Quantity	Price
1	SKA	RED	1	\$40.00
2	SKC	BLCK	1	\$30.00

Determine eligible price codes: The date on the Order Header falls within the date range for the following price codes in the Price Code table:

Price Code	Seq	Start	End	Qty	Type of Price Code Discount
101	4	2/1/12	4/1/12	1	<i>Dollar off:</i> \$2 off 1
202	3	2/1/12	4/1/12	2	<i>Percent off:</i> 10% off 2

Determine price code customer assignment: The sold to customer on the order and the *CPG* customer price group defined in the Customer Price Group Code for *CPG Pricing Only* (L58) system control value qualify for the following price codes in the Price Code Customer table:

Price Code	Customer#	Customer Price Group
101	10	
202		CPG

Determine price code item assignment: The details in the Price Code Details table for the items on the order are:

Price Code	Item	SKU	Source Code
101	SKA		7
101	SKC		7
202	SKA		7
202	SKC		7

**Note:**

If an item contains SKUs and no SKUs are defined for the item in the Price Code Details table, all SKUs for the item qualify for the price code.

Reprice the order: When you select *Reprice* at the Order Detail screen, the system:

- applies any non-freight discounts, detail-level coupon promotions, and any other promotions to the lines on the order. The sold to customer qualifies for a free gift with a merchandise total of \$65.00. Because the merchandise total for the order before performing best price comparison is \$66.00 (\$38.00 + \$38.00), the system adds the free gift to the order.

- determines whether the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value provides a greater discount than the customer price group assigned to the sold to customer on the order:

Line#	Item	Initial Price	Price Code	Default Customer Price Group Price	Sold To Customer Price Group Price
1	SKA	\$40.00	101	Percent off: 10% off 2 Price changes from \$40.00 to 36.00	Dollar off: \$2 off 2 Price changes from \$40.00 to \$38.00
2	SKC	\$40.00	202	Percent off: 10% off 2 Price changes from \$40.00 to 27.00	Dollar off: \$2 off 2 Price changes from \$40.00 to \$28.00

Results: The price for the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value is lower than the price for the customer price group assigned to the sold to customer on the order. Because the price is lower, the system updates the order lines to use the price offered by the default customer price group.

Apply order-level coupons: The order qualifies for an order-level coupon that provides \$5.00 off the order.

The system applies the \$5.00 order-level coupon discount to each order line on a pro-rata basis. The merchandise total after applying all other discounts and promotions and determining the best price is \$63.00 (36.00 + 27.00).

The system uses the following calculations to determine the discount amount to apply to each order line.

The system calculates the Discount Percentage for each order line:

order line extended amount after applying all other discounts and promotions and best price / order merchandise total = discount percentage

order line 1: $36.00 / 63.00 = .5714$

order line 2: $27.00 / 63.00 = .4286$

The system calculates the Unit Selling Price for each order line:

order line post-discount unit price - [(total order-level coupon amount X discount % from above calculation) / line unit quantity] = unit selling price

line 1: $36.00 - [(5.00 \times .5714) / 1] = \$33.14$

line 2: $27.00 - [(5.00 \times .4286) / 1] = \$24.86$



Note:

Even though the merchandise total after performing best price comparison and applying any order-level coupons to the order is now \$58.00 (while the free gift for the sold to customer required a merchandise total of \$60.00), the system retains the free gift that was added to the order.

Order Detail table updates: The system updates the Order Detail table after repricing the order.

Field	Item SKA	Item SKC
ODT Offer Price	Initial price: 40.00	Initial price: 30.00
ODT Original Price	List price: 40.00	List price: 30.00
ODT Pre-Discount Price	Price before reprice: 38.00	Price before reprice: 28.00
ODT Price	Order line price: 33.14	Order line price: 24.86
Price Method	J = Repriced CPG Best Price	J = Repriced CPG Best Price
Basic Customer Price	33.14	24.86
Basic Customer Pre-Discount Price	36.00	27.00
Basic Customer Original Price	36.00	27.00
Customer Price Group Original Price	38.00	28.00
Basic Customer Price Method	E = Price code	E = Price code

Customer Price Group Pricing in Order Maintenance

During order maintenance, the system performs [Line Level Customer Price Group Pricing](#) when you add, change, or delete the lines on an order.

The system does NOT perform [Customer Price Group Price Code Pricing](#) or [Customer Price Group Best Price Comparison](#) during order maintenance. The system displays an error message when you select *Reprice*: Selected function is not valid for current processing mode (Maintain).

Reviewing Forecasting Information

Topics in this part:

- [Inventory Status Inquiry \(ISIQ\)](#) allows you to review the current inventory status and order totals for an item by offer. [Generating Forecasting Reports](#) provides descriptions and examples of several reports that help you evaluate sales response for an offer and plan and reorder merchandise.

Using House List Options

Topic in this part:

- [Working with Merge/Purge Sold-to Names \(MMCS\)](#) describes how to generate a listing of duplicate records and merge customer sold-to records.
- [Merging and Purging Customer Bill To Names \(MMCB\)](#) describes how to merge customer bill-to records.

10

Merchandising

- [Setting Up the Item Supporting Tables](#)
- [Setting Up the Purchasing Tables](#)
- [Creating and Working with Items](#)
- [Setting up SKUs](#)
- [Working with Sets](#)
- [Updating Items and SKUs](#)
- [Maintaining Purchase Orders](#)
- [Using Purchase Order Inquiry](#)
- [Printing Purchase Orders](#)
- [Printing Purchase Order Reports](#)
- [Performing Inventory Analyses](#)
- [Retail Integration \(External System to Order Administration\)](#)

Setting Up the Item Supporting Tables

Supporting tables: This part describes how to set up the item supporting tables. Generally, these tables contain codes and associated descriptions which you use to define and classify items.

- [Working with Hazardous Item Codes \(WHAZ\)](#) describes creating, changing, deleting, and displaying these codes.
- [Working with Item Category Codes \(WITG\)](#) describes creating, changing, deleting, and displaying these codes.
- [Working with Item Classes \(WICL\)](#) describes creating, changing, deleting, and displaying these codes.
- [Working with Item Status \(WIST\)](#) describes creating, changing, deleting, and displaying these codes.
- [Working with Long SKU Classes \(WLSC\)](#) describes creating, changing, deleting, and displaying these codes.
- [Working with Long SKU Departments \(WLSD\)](#) describes creating, changing, deleting, and displaying these codes.
- [Working with Units of Measure \(WUOM\)](#) describes creating, changing, deleting, and displaying these codes.
- [Working with Item Subscriptions \(WISB\)](#) describes creating, changing, deleting, and displaying subscription items.
- [Working with Item Keywords \(WKEY\)](#) describes creating, changing, and deleting keywords you can use when scanning for an item.

- [Working with Item Keyword Exclusions \(WEXC\)](#) describes creating, changing, and deleting words you can exclude from automatic keyword creation.
- [Working with Tax Product Code Cross References \(WTPC\)](#) describes how to set up a cross reference table to map tax product codes to an item class, long SKU division, long SKU department, and long SKU class combination.

Setting Up the Purchasing Tables

Purpose:

- [Working with Buyers \(WBUY\)](#) explains how to create, change, delete, and display buyer information.
- [Working with Purchase Order Ship Via \(WPSV\)](#) explains how to create, change, delete, and display ship via codes for purchase orders.
- [Working with Vendors \(WVEN\)](#) includes how to create, change, delete, and display vendor information.
- [Working With PO Additional Charges \(WPAC\)](#) explains how to create, change, delete, and display additional charges for purchase orders.
- [Working with Unit of Measure Conversions \(WUMC\)](#) explains how to create, change, delete, and display unit of measure conversions between your selling unit of measure and the vendor's unit of measure.
- [Working with Vendor Items \(WVNI\)](#) describes how to create, change, delete, and display vendor item information. Vendor items are a reference between the vendor's item information and the item information used by your company.
- [Working with Vendor Upload \(LVUP\)](#) explains how to upload vendor information into Order Administration.

Creating and Working with Items

Purpose: The following chapters describe how to create and work with items.

- [Performing Initial Item Entry \(MITM\)](#) describes selecting items, creating items, creating item (base information), creating offers, and creating SKUs with overrides.
- [Working with Existing Items \(MITM\)](#) includes scanning, changing, deleting, and displaying items that have been created.
- [Working with SKUs](#) defines split SKU elements, SKU groups, and the SKU generator. This topic includes how to scan for, change, delete, and display SKUs.
- [Assigning Items/SKUs to Offers](#) includes how to work with item/SKU offers, price breaks, page letters, aliases, and accompanying items.
- [Assigning Items to Warehouses](#) discusses item warehouse information and item location information.
- [Entering Additional Item Information](#) describes comments and source prices.
- [Working with Item Tax Exemptions \(WITX\)](#) describes how to set up tax exemptions or exceptions for specific items or item classes by location.
- [Working with GST Tax Exemption Status \(MGTX\)](#) describes how to set up tax exemptions or exceptions for specific items by Canadian province.
- [Updating Harmonize Codes \(UPHC\)](#) describes how to update harmonize codes quickly for multiple items or SKUs.

- [Working with Freight Exempt Items \(WFEI\)](#) describes how to exclude items from freight.
- [Working with Item Ship Via Overrides](#) describes how to set up eligible shippers for an item.
- [Working with Item Coordinate Types \(WICT\)](#) describes how to create and work with item coordinate types.
- [Copying Items](#) describes how to copy item information from one item to a newly created item in the same company or copy item information from one item to another item, with the same item number, in one or more shared companies.

Working with SKUs

Purpose: A SKU (stock keeping unit) is used to further define an item. An item that is sold in multiple colors and sizes is often represented by a base item number, which is common to all of the colors and sizes, and a SKU, which specifically defines the color and or size. For example, the base item number for a dress might be 9201, and the SKUs associated with that item number might be RED SML, RED MED, RED LRG, BLUE SML, BLUE MED, and BLUE LRG.

All functions accessible at the base item level are accessible at the SKU level, including offers, warehouses, sets, and comments. Information entered at the SKU level overrides information defined at the base item level.

In this topic:

- [Split SKU Elements](#)
- [SKU Groups](#)
- [SKU Sort Sequence Numbers](#)
- [SKU Generator](#)
- [Work with SKUs Screen](#)

Split SKU Elements

The elements of the Split SKU are defined in the System Control table. There are three elements used in the Split SKU environment. Typically, these elements are used to represent size, color and width for items of apparel; however, you can define the elements to meet your particular requirements. Once you set up the elements in the System Control table, you will be prompted for this information throughout the system.

SKU Groups

A SKU Group can be assigned to an item in the Item table and is used to define the standard sizes or colors in which items are sold. You can use [Working with SKU Groups \(WISG\)](#) to create groups to facilitate data entry [Using the SKU Generator \(ESKG\)](#).

For example, a SKU group can be defined for a particular manufacturer's product line for dresses. You can define an Item SKU Group for dress size. For example, the Item SKU Group 001 could be set up for dresses and would list the sizes in which these dresses are available (4, 6, 8, 10, 12, 14, regular and petite).

SKU Sort Sequence Numbers

SKU sort sequence numbers are numbers used to determine the order in which SKUs sort.

You can use the sort sequence to display SKUs in a different order, such as by size, rather than alphanumerically by SKU code. See [SKU Sort Sequence Numbers](#) for an overview.

SKU Generator

The SKU Generator is used to create all the SKUs for an item automatically. Once you define the item and the SKU group, you can run the SKU generator to automatically build all the SKU records.

When generating SKUs for an item, you can accept the defaults as defined in the SKU Groups or you can add or subtract individual SKUs.

For more information about SKU elements, SKU groups and the SKU generator, see [Setting up SKUs](#).

**Note:**

Before you can work with SKUs, you must create the SKU information on the system. You can create SKUs by selecting *Create* at the [Work with SKUs Screen](#).

Work with SKUs Screen

Purpose: Use this screen to create, change, delete and display related records for a base item.

How to display this screen: At the [Work with Items Screen](#), select *SKU* for a SKUed item (the *SKU* field is selected).

Field	Description
Item	The item code and item description whose SKUs you are reviewing. Item code: Alphanumeric, 12 positions; display-only. Item description: Alphanumeric, 120 positions; display-only.
Colr (Color)	The color of the item/SKU.

**Note:**

“Colr” represents SKU Element 1, which is user-defined at the System Control table. Color is used for sample purposes only.

Size	Split SKU: alphanumeric, 4 positions; optional. The size of the item/SKU.

**Note:**

“Size” represents SKU Element 2, which is user-defined at the System Control table. Size is used for sample purposes only.

Alphanumeric, 4 positions; optional.

Field	Description
Othr (Other)	The other characteristic of the item/SKU.
 Note: “Othr” represents SKU Element 3, which is user-defined at the System Control table. Other is used for sample purposes only.	
Description	Alphanumeric, 4 positions; optional. The description of the SKU. Alphanumeric, 40 positions; optional.
Color, Size, Width	The long SKU elements (L/S Color, L/S Size, L/S Width) used to further define the item, typically for reporting purposes. Alphanumeric, three 4-position fields; optional.

Screen Option	Procedure
Create a SKU	Select <i>Create</i> to advance to the Create SKU 1 of 2 (With Overrides) Screen .
Change SKU information	Select <i>Change</i> for a SKU to advance to the Change SKU Screen. At this screen you can change any information except the SKU. See Create SKU 1 of 2 (With Overrides) Screen for field descriptions.
Delete SKU information	Select <i>Delete</i> for a SKU to delete it.

 Note:

If you delete a SKU, the following dependent tables are deleted:

- Item warehouse
- Kit/Kit details
- Lot
- Set/Set details
- SKU comments
- SKU offer
- Variable set/Variable set group/Variable set details
- Vendor item
- House list SKU

Display SKU information	Select <i>Display</i> for a SKU to advance to the Display SKU Screen. You cannot change any information on this screen. See Create SKU 1 of 2 (With Overrides) Screen for field descriptions.
Comments	Select <i>Comments</i> for a SKU to display the Work with Item/SKU Comments Screen .
Finished goods	Select <i>Finished Goods</i> for a SKU to display the Work with Finished Goods Screen .

Screen Option	Procedure
External Image and Information Link	Select <i>Image/Info Link</i> for a SKU to advance to the Item Image/Info Link Screen .
 Note: This option is available only if the Use External Item Image (L55) system control value is selected.	
Offers	Select <i>Offers</i> for a SKU to advance to the Work with SKU Offers Screen .
Sets	Select <i>Sets</i> for a SKU to display the Work with Sets Screen .
UPC codes	Select <i>UPC</i> for a non-SKUed item to advance to the Work with UPC Codes Screen . You can work with UPC codes for a SKUed item by selecting <i>SKU</i> for the item and selecting the UPC option from the Work with SKUs Screen .
Work with user defined fields	Select <i>User Fields</i> for a customer to advance to the Work with User Fields Screen .
Variable Sets	Select <i>Variable Sets</i> for a SKU to display the Work with Variable Sets Screen .
Vendor Item	Select <i>Vendor Item</i> for a SKU to advance to the Work with Vendor Item Screen .
Warehouse	Select <i>Warehouses</i> for a SKU to display the Work with Item Warehouse Screen .

Assigning Items to Warehouses

Purpose: Use the Work with Item Warehouse function to indicate the warehouses where you keep an item, and to define information particular to that item/warehouse combination.

In this topic:

- [Work with Item Warehouse Screen](#)
- [Create Item Warehouse Screen](#)
- [Change Item Warehouse Screen](#)

Work with Item Warehouse Screen

How to display this screen: From the [Work with Items Screen](#):

- for a non-SKU'd item, select *Warehouse* for the item
- for a SKU'd item, first select *SKU* for the item to advance to the [Work with SKUs Screen](#), then select *Whses* for the SKU

Field	Description
Whs (Warehouse)	The warehouse where you keep an item. Numeric, 3 positions; optional.

Field	Description
Description	The description of the warehouse. Alphanumeric, 30 positions; optional.
On hand	The number of units of this item across all locations in the warehouse. Numeric, 7 positions; optional.
On order	The number of units that are due to be received in this warehouse through purchase orders. Numeric, 7 positions; optional.
Protected	An amount of inventory protected from reservation for this item or SKU across all locations in this warehouse. Numeric, 7 positions; optional.
Resv Freeze (Reservation freeze)	Indicates whether the item or SKU in this warehouse is frozen. Valid values are: • <i>Yes</i> = The item/SKU warehouse is frozen. • <i>No</i> = The item/SKU warehouse is not frozen. If an item or SKU warehouse is frozen: 1. Pick Slip Generation ignores the item warehouse when determining where inventory should be picked to fulfill an order. See Performing Pick Slip Generation. 2. Inventory does not reserve during Order Entry. See Reviewing Reservation Types.

Screen Option	Procedure
Create an item warehouse record	Select <i>Create</i> to advance to the Create Item Warehouse Screen .
Change item warehouse information	Select <i>Change</i> for an item warehouse record to advance to the Change Item Warehouse Screen .
Delete item warehouse information	Select <i>Delete</i> for an item warehouse record to delete it. If there are dependent records associated with this warehouse, the system will display a warning message. Deleting this warehouse will also delete the following dependent records: • Item location • Item transaction history • Item transaction summary • Item warehouse history

 Note:

You cannot delete an item/warehouse record if there are open orders, quantity on hand, or quantity on order.

Screen Option	Procedure
Display item warehouse information	Select <i>Display</i> for an item warehouse record to advance to the Display Item Warehouse Screen. You cannot change any information on this screen. See Create Item Warehouse Screen for field descriptions.
Work with item locations	Select <i>Locations</i> for an item warehouse record to advance to the Work with Item Locations Screen . See Creating and Maintaining Item Warehouses .
Work with user defined fields	Select <i>User Field</i> for an item warehouse to advance to the Work with User Fields Screen .

Create Item Warehouse Screen

Purpose: At the [Work with Item Warehouse Screen](#), select *Create*.

Field	Description
Warehouse	A code that represents a warehouse. Warehouse codes are defined in and validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions. Create screen: required. Change screen: display-only.
Reservation freeze	Indicates whether the item or SKU in this warehouse is frozen. Valid values are: <i>Selected</i> = The item/SKU warehouse is frozen. <i>Unselected</i> = The item/SKU warehouse is not frozen. If an item or SKU warehouse is frozen: - Pick Slip Generation ignores the item warehouse when determining where inventory should be picked to fulfill an order. See Performing Pick Slip Generation. - Inventory does not reserve during Order Entry. See Reviewing Reservation Types.
Protected qty (Protected quantity)	The unit quantity of this item/SKU protected from reservation. The system does not reserve this inventory except through Working with Interactive Reservation (MIRV), which you might use for large wholesale orders or preferred mail order customers. Protected quantity is included in on-hand quantity. This quantity is also protected from being used to replenish another warehouse. You cannot enter an amount in this field if the Use Work Order Processing (E37) system control value is <i>selected</i>. Numeric, 7 positions; optional.
Min qty (Minimum quantity)	The minimum number of units to be kept on hand in the warehouse. Numeric, 7 positions; optional.
Protect min/max (Protect minimum and maximum quantities)	This field is not currently implemented. Included only if the Use Store File (G15) system control value is <i>selected</i>. An error message indicates if you try to change this value and you do not have authority to the Maintain Item Warehouse Minimum/Maximum Quantity (A92) secured feature: Not authorized to change.

Field	Description
Max qty (Maximum quantity)	The maximum number of units to be kept on hand. If you do not specify a reorder quantity (below), the system uses this value to determine the quantity to reorder by subtracting the on-hand quantity from the maximum quantity. Numeric, 7 positions; optional.
Economic order qty. (Economic order quantity)	The recommended optimum ordering quantity for this item or SKU, based on a set of criteria such as quantity, cost, etc. Used for inventory reporting purposes only. Numeric, 7 positions; optional.
Reorder qty. (Reorder quantity)	The quantity of this item or SKU that should be replenished when the item or SKU reaches the minimum stock level for the warehouse. Numeric, 7 positions; optional.
Original retail price	The original price of this item in the retail store. You can use this field to track the original retail price for the item if the warehouse represents a retail store. Included only if the <i>Use Store File (G15)</i> system control value is <i>selected</i> . Numeric, 13 positions with a 2-place decimal; optional.
Protect price (Protect current price)	This field is not currently implemented. Included only if the <i>Use Store File (G15)</i> system control value is <i>selected</i> . An error message indicates if you try to change this value and you do not have authority to the Maintain Item Warehouse Retail Price (A91) secured feature: Not authorized to change.
Current retail price	The current price of this item in the retail store. You can use this field to track the current retail price for the item if the warehouse represents a retail store. Included only if the <i>Use Store File (G15)</i> system control value is <i>selected</i> . Numeric, 13 positions with a 2-place decimal; optional.
User field 1	An informational field where you can enter additional item warehouse information. Alphanumeric, 10 positions; optional.
User field 2	An informational field where you can enter additional item warehouse information. Alphanumeric, 10 positions; optional.

Change Item Warehouse Screen

To change: Select *Change* for a warehouse at the [Work with Item Warehouse Screen](#) to advance to the Change Item Warehouse screen. At this screen you can change any information except the Item and Warehouse. See [Create Item Warehouse Screen](#) for field descriptions.

Secured features:

- The system displays the following error message if you try to change the Minimum quantity, Maximum quantity, or Protect minimum/maximum field and you do not have authority to the [Maintain Item Warehouse Minimum/Maximum Quantity \(A92\)](#) secured feature:

Not authorized to change.

- The system displays the following error message if you try to change the Original retail price, Current retail price, or Protect price field and you do not have authority to the [Maintain Item Warehouse Retail Price \(A91\)](#) secured feature:

Not authorized to change.

Entering Additional Item Information

Purpose: The Work with Items screen provides the opportunity to work with additional information, such as:

- *Comments:* You can add comments or additional information about an item at the [Work with Item/SKU Comments Screen](#). You can also select where comments will be printed (e.g., pick slips, invoices, reports, pop-up windows, all areas, or no areas).
- *Special Source Prices:* You have the option to define price breaks, or special pricing for certain items, through the [Work with Special Source Price Screen](#).
- *Item Coordinates:* You can define items or SKUs that coordinate with a specific item, so that when a customer orders the item in order entry you can cross-sell the coordinates. See [Working with Item Coordinates \(WCIO\)](#).
- *UPC codes:* Use the [Work with UPC Codes Screen](#) to assign UPC codes to an item/SKU.
- *Country and State Restrictions:* You can restrict an item from being ordered in order entry if the item cannot be shipped to the country or state of the order. Use the [Work with Item Restriction by Country/State Screen](#).
- *Image Link:* If the [Use External Item Image \(L55\)](#) system control value is selected, you can define the URLs where the item image and product information for the item are stored on an external image hosting application. See [Item Image/Info Link Screen](#).

In this topic:

- [Work with Item/SKU Comments Screen](#)
- [Work with Special Source Price Screen](#)
- [Create Special Source Price Screen](#)
- [Work with UPC Codes Screen](#)
- [Work with Item Restriction by Country/State Screen](#)
- [Create Item Restriction by Country/State Screen](#)
- [Item Image/Info Link Screen](#)

Work with Item/SKU Comments Screen

Purpose: Use this screen to enter comments about an item or SKU and identify where those comments should print or display. You can specify a different print or display selection for each line of item comments.

Item and SKU comments can appear on:

- pick slips
- invoices
- both pick slips and invoices
- reports
- a pop-up window when you add the item or SKU to an order

You can also specify to have the item comment appear nowhere. In this situation, you must use the Work with Item/SKUs menu option to review the comments.

Item or SKU level: You can enter item comments at either the base item level or the SKU level. If you enter both, the comments at the SKU level override the base item-level comments. For example, if item AB100 comes in RED, BLUE, and PINK, and if you enter item comments for the base item and for the RED SKU, the SKU-level comments will appear for the RED SKU only; the base item-level comments will appear for the BLUE and PINK SKUs.

Pop-up window: Comment lines whose Print code is set to *Window* prompt the [Work with Item/SKU Comments Window](#) to open when you enter the item code in order entry or maintenance. The window also opens when you:

- enter a quantity of the item at the [Display Item Availability Screen](#) in order entry (available by selecting *Item Availability* at the Select Customer Sold To for Order screen)
- enter the item as an exchange for a customer return (see [Returning and Exchanging Items in Order Maintenance](#); or [Introducing Return Authorizations \(WRTA\)](#))

The pop-up window does not display when the item is added to an order in other ways, such as a price table premium or item coordinate.

How to display this screen:

- *Non-SKUed item:* At the [Work with Items Screen](#), select *Comments* for the item.
- *SKUed item:*
- To enter comments at the base item level by following the instructions, above, for a non-SKUed item; or,
- Select SKU for the base item at the Work with Item Screen to advance to the [Work with SKUs Screen](#), then select *Comments* for the SKU.

Field	Description
Print code	This code indicates where to print or display your comments. Valid values are: • <i>Print on picks and invoices</i> = Comments print on the base pick slip, or on your unique pick slip and unique invoice if supported by your unique printing program. Comments do not print on the base invoice print program supplied by Order Administration. • <i>Print on invoices only</i> = Comments print on invoices only if supported by your unique invoice print program. Comments do not print on the base invoice print program supplied by Order Administration. • <i>None</i> (default) = Do not print or display. • <i>Print on picks only</i> = See the Pick Slip. • <i>Print on reports only</i> = Printing on reports is not currently implemented. • <i>Window</i> = Display in the Work with Item/SKU Comments Window when you select an item to add to an order Required.
Comments	The free-form comments that you can enter. Alphanumeric, 50 positions (each line); required.

Work with Special Source Price Screen

Purpose: Use this screen to change, delete, display, or create price breaks on an item for a certain group of customers. Source prices are established at the base item level, not at the SKU level.

You can define additional special prices for associate customers (as defined in the Customer Sold To table). You can also specify a quantity required to receive the special source price.

Related system control values:

- If the [Perform Source Pricing Validation \(D62\)](#) system control value is *selected* and there are any source special pricing records set up for the source code on the order header, the system prevents you from adding any items to the order if they are not included in the special source pricing.
- The [Pricing Values \(B31\)](#) system control value controls the order in which the system evaluates pricing options for the order, based on the priority assigned to the [Special by Source Sequence # \(A82\)](#) system control value.



Note:

To enter multiple item special prices by source code, you can also use [Working with Source Codes \(WSRC\)](#) or [Working with Special Pricing by Source Code \(WSPP\)](#).

How to display this screen: At the [Work with Items Screen](#), select *Source Prices* for an item.

Field	Description
Source	A code representing a group of customers to whom you sell. Alphanumeric, 9 positions; optional.
Qty (Quantity)	The number of units of the item that the customer must purchase to receive the special price. Numeric, 5 positions; optional.
Price	The price the customer pays for the item on qualifying orders. Numeric, 13 positions with a 2-place decimal; optional.
Assoc price (Associate price)	The price an associate customer pays for the item on qualifying orders. Numeric, 13 positions with a 2-place decimal; optional.
Tax inclusive price	The price a customer pays for the item on qualifying order subject to tax-inclusive pricing and VAT. On orders subject to VAT, tax does not accumulate in the Tax bucket; instead, the customer pays a tax-inclusive price and VAT is “hidden” on the order detail line. Included only if the Tax Included in Price (E70) system control value is <i>selected</i> . Numeric, 13 positions with a 2-place decimal; optional.
Tax-inclusive associate price	The price an associate customer pays for the item on qualifying order subject to tax-inclusive pricing and VAT. On orders subject to VAT, tax does not accumulate in the Tax bucket; instead, the customer pays a tax-inclusive price and VAT is “hidden” on the order detail line. Included only if the Tax Included in Price (E70) system control value is <i>selected</i> . Numeric, 13 positions with a 2-place decimal; optional.

Screen Option	Procedure
Create a source price	Select <i>Create</i> to advance to the Create Special Source Price Screen .
Change a source price	Select <i>Change</i> for a price to advance to the Change Source Price Screen. You can change any information on this screen except the item and source. See Create Special Source Price Screen for field descriptions.
Delete a source price	Select <i>Delete</i> for a price to delete it.
Display a source price	Select <i>Display</i> for a price to advance to the Display Source Price Screen. You cannot change any information on this screen. See Create Special Source Price Screen for field descriptions.

Create Special Source Price Screen

To create: At the [Work with Special Source Price Screen](#), select *Create*.

Field	Description
Source	A code used to define a segment of your mailings. Validated against the Source Code table. See Working with Source Codes (WSRC) . Alphanumeric, 9 positions. Create screen: required. Change screen: display-only.
Qty (Quantity)	The quantity of the item that the customer must purchase to receive this price break. Numeric, 5 positions; required.
Price	The selling price of the item when an order meets the defined source code and quantity requirements. This price applies to all SKUs of the item on the order. Numeric, 13 positions with a 2-place decimal; required.
Tax inclusive price	The selling price of the item when an order meets the defined source code and quantity requirements and the order is subject to VAT. This price applies to all SKUs of the item on the order. Displayed only if the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i> . Numeric, 13 positions with a 2-place decimal; optional.
Assoc price (Associate price)	The selling price of this item when an order meets the defined source code and quantity requirements and the customer is an associate. Customers are eligible for associate price breaks if they are identified as associate customers in the Customer table and if Assoc = <i>Selected</i> in Order Entry. Numeric, 13 positions with a 2-place decimal; optional
Tax inclusive associate price	The selling price of this item when an order meets the defined source code and quantity requirements, the customer is an associate, and the order is subject to VAT. Customers are eligible for associate price breaks if they are identified as associate customers in the Customer table and if Assoc = <i>Selected</i> in Order Entry. Displayed only if the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i> . Numeric, 13 positions with a 2-place decimal; optional.

Work with UPC Codes Screen

Purpose: Use this screen to create or delete a UPC code for an item/SKU.

You can create as many UPC codes for an item/SKU as you like; however, the system validates that you do not create a duplicate UPC code.

How to display this screen:

- for a non-SKUed item, at the [Work with Items Screen](#), select **UPC** for an item. If the item has SKUs, an error message indicates: `Must set UPC at SKU level`.
- for a SKUed item, first advance to the [Work with SKUs Screen](#) (select **SKU** at the Work with Item screen); then, at this screen, select **UPC** for a SKU.

Field	Description
Item/SKU	The code and description of the item. If the item contains SKUs, the SKU code is also included. Item code: Alphanumeric, 12 positions; display-only. SKU code: Alphanumeric, three 4-position fields; display-only. Item description: Alphanumeric, 120 positions; display-only.
Type	The type of UPC code. Informational only. Valid values are: • <i>E13</i> = EAN-13, indicating a 13 position UPC code; however Order Administration does not validate the UPC length. • <i>E8</i> = EAN-8, indicating an 8 position UPC code; however, Order Administration does not validate the UPC length. • <i>UA</i> = UPC-A, indicating a 12 position UPC code; however Order Administration does not validate the UPC length. • <i>UE</i> = UPC-E, indicating a 6 position UPC code; however Order Administration does not validate the UPC length. The last UPC type you used defaults. Alphanumeric, 3 positions; optional.
UPC code	A UPC code defined for the item/SKU. • A message similar to the following indicates if the UPC code has already been assigned to another item/SKU: <code>UPC already assigned to ACB958</code>. • A message similar to the following indicates if the UPC code has already been created for the item: <code>UPC already assigned to IT948</code>.
Vendor	Alphanumeric, 14 positions; optional. A code that identifies a supplier who sells you merchandise. Vendor codes are defined in and validated against the Vendor table; see Working with Vendors (WVEN) . Numeric, 7 positions; optional.



Note:

Include any leading zeros. For example, if the UPC code is *06012011*, enter *06012011* and not *6012011*.

To create: Enter the UPC type in the Type field and enter the UPC code in the UPC code field. Make sure to add any leading zeros. The bottom half of the screen displays the UPC code you just created.

- A message indicates if the UPC code has already been assigned to another item/SKU:
UPC already assigned to ABC987.
- A message indicates if the UPC code has already been created for the item: UPC
already assigned to ITEX.

**Note:**

You cannot change a UPC code once the code is created. Instead, you must delete the UPC code and create a new code.

Work with Item Restriction by Country/State Screen

Purpose: Use country/state restrictions to prevent items from being added to an order in order entry/order maintenance if the ship to address for the order is in a country or state to which you cannot ship the items.

How country/state restrictions work: When you take an order for an item which is restricted from being shipped to the country or state of the ship to address, the item will be highlighted, and a message similar to the following will display in order entry/order maintenance:

Item (XXXXX) cannot be shipped to (COUNTRY/STATE).

Country/state restrictions are defined at the item level. For SKUed items, country/state restrictions apply to all SKUs of an item.

Setting restrictions for an entire country: Countries and states for countries are defined using the Work with Countries menu option. If the country's Require state? field is *selected*, then you must specify a valid state when you set an item restriction for that country, and you must set a separate restriction for each state to which you cannot ship the item.

Example:

You have *selected* the Require state? field for the USA.

To set an item restriction for a state: Enter the USA's code in the Country field and a valid state code in the State field.

To set an item restriction for the entire country: you must set an item restriction for each state in the country.

If the country's Require state? field is *unselected*, you can define item shipping restrictions for the entire country, or, if you wish, for valid states in that country.

Example:

You have *unselected* the Require state? field for Canada.

To set an item restriction for a province: Enter Canada's code in the Country field, and a valid state (province) in the State field.

To set an item restriction for the entire country: Enter Canada's code in the Country field. Leave the State field blank.

See [Setting Up the Country Table \(WCTY\)](#) for more information about setting up countries and states.

How to display this screen: Select *Ctry/St Restr* for an item at the [Work with Items Screen](#).

Field	Description
Item	The item that you selected at the Work with Items screen which is restricted from being shipped to specific countries or states. When you try to add this item to an order with a ship to address in a restricted state or country, order entry/maintenance displays an error message such as: Item (XXXXXX) cannot be shipped to (COUNTRY/STATE). The item description is to the right. Item: alphanumeric, 12 positions; display-only. Description: alphanumeric, 120 positions; display-only.
Country	A country to which you cannot ship the item, or in which one or more states have shipping restrictions for the item. Countries are defined in and validated against the Country table. If the country's Require state? field is <i>unselected</i>, and you do not specify a state in the State field when setting up the item restriction, the restriction will apply to the entire country. See Setting Up the Country Table (WCTY) for more information on defining countries and states. Alphanumeric, 3 positions; optional.
State	A state which has a shipping restriction for the item. States for a country are defined using the Work with Countries menu option. See Setting Up the Country Table (WCTY). Alphanumeric, 2 positions; optional.

Screen Option	Procedure
Create a country/state restriction for the item displayed on this screen	Select <i>Create</i> to advance to the Create Item Restriction by Country/State Screen .
Delete a country/state restriction for the item displayed on this screen.	Select <i>Delete</i> for a country/state restriction to delete it.

Create Item Restriction by Country/State Screen

Purpose: Use this screen to create a country/state restriction for the item you selected at the Work with Items screen.

How to display this screen: Select *Create* at the [Work with Item Restriction by Country/State Screen](#).

Field	Description
Item	The item that you selected at the Work with Items screen. When this item is ordered by a customer whose ship to address is in a restricted country or state, order entry/maintenance displays an error message such as: Item (XXXXXX) cannot be shipped to (COUNTRY/STATE). Item: alphanumeric, 12 positions; display-only. Description: alphanumeric, 120 positions; display-only.

Field	Description
Country	A country to which you cannot ship the item, or in which one or more states have shipping restrictions for the item. The country will default from the Default Country for Customer Address (B17) system control value, but you can change it. Countries are defined in and validated against the Country table. If the country's Require state? field is <i>unselected</i>, and you do not specify a valid state in the State field when creating a Country/State restriction, then the item restriction will apply to the entire country. See Setting Up the Country Table (WCTY). Alphanumeric, 3 positions; required.
State	A state which has a shipping restriction for the item. States for a country are defined using the Work with Countries menu option. See Setting Up the Country Table (WCTY). Alphanumeric, 2 positions; required if the Require state? field for the country is selected in the Country table.

Item Image/Info Link Screen

Purpose: Use this screen to define the URLs where the image and product information for an item or SKU are stored on an external image hosting application.



Note:

This option is available only if the [Use External Item Image \(L55\)](#) system control value is selected; otherwise, an error message displays: Image/Info Link not available - enabled by SCV L55.



Note:

You need to specify the complete URL for an item image; the [IMAGE_URL_PREFIX](#) property is not used for item images.

Import from OCDS: You can import primary item images from Omnichannel Cloud Data Service (OCDS) as well as other item-related data. This import is available regardless of the setting of the [Use External Item Image \(L55\)](#) system control value. See [Importing Enterprise Foundation Data through Omnichannel Cloud Data Service \(OCDS\)](#) for more information.

Displaying the item image:

- [Work with Order Lines Screen \(Adding Items to the Order\)](#): This screen displays the image for each item after you enter the item, and the image of the last item entered remains on this screen until you exit. The image that displays is:
 - The image defined at the SKU level.
 - If an image is not defined at the SKU level, the image defined at the item level displays.
 - If an image is not defined at the SKU or item level, no image displays.

If you click on the image, the system opens a web browser to the URL specified in the [Information Link](#) field for the item/SKU on the Item Image/Info Link screen.

- [Work with Items Screen](#) (MITM) When you mouse over the item code, this screen displays:
- the image defined at the item level.
- If an image is not defined at the item level, the image defined for the first SKU in alphabetical order displays.
- If an image is not defined for the item or SKU, no image displays.
- *Modern View:* Various pages and windows in Modern View display the item or SKU image, if defined, including Contact Center Order Entry, the Order Summary page, Add Item window, and Frequently Purchased Items panel. See the Modern View online help for details.

Image size: The image is displayed at 150 x 150 pixels at the [Work with Order Lines Screen \(Adding Items to the Order\)](#), and at 120 x 120 pixels at the [Work with Items Screen](#) in item maintenance.

How to display this screen:

- *Item level:* Select *Image/Info Link* for an item at the [Work with Items Screen](#).
- *SKU level:* Select *Image/Info Link* for a SKU at the [Work with SKUs Screen](#).

Field	Description
Item	The item you selected at the Work with Items Screen . Alphanumeric, 12 positions; display-only.
SKU	The SKU you selected at the Work with SKUs Screen .



Note:

The SKU displays only if you are defining an image and information link for the SKU of an item.

Item Description	Alphanumeric, three 4-position fields; display-only. A description of the item.
SKU Description	Alphanumeric, 120 positions; display-only. A description of the SKU.



Note:

The SKU description displays only if you are defining an image and information link for the SKU of an item.

Alphanumeric, 40 positions; display-only.

Field	Description
Image Link	The URL to the location of the item image on the external image hosting application. The system does not validate that the URL you enter is valid. Import from OCDS: See Importing Enterprise Foundation Data through Omnichannel Cloud Data Service (OCDS) for more information on importing this information from OCDS. Alphanumeric, 256 positions; optional.
Information Link	The URL to the location of the item information on the external image hosting application. The system does not validate that the URL you enter is valid.

 **Note:**

If the URL is too long, the Work with Order Detail screen might not be aligned correctly.

Alphanumeric, 256 positions; optional.

Copying Items

Overview: Copying items allows you to:

- Copy item information from one item to a new item in the same company using the [Copy Item Window](#).
- Create an item upload record to add or change item information, for an item with the same item number as the copied item, in each shared company using the [Copy Item to Company Window](#).

In this topic:

- [Copy Item Window](#)
 - [Copy Item Process](#)
- [Copy Item to Company Window](#)
 - [Copy Item to Company Process](#)

Copy Item Window

Purpose: Use this window to copy item information from one item to a new item in the same company.



Note:

The system copies item information from the Item table and SKU table; any other tables related to the item, such as Item Offer or Vendor Items, are not copied to the new item. Once the item is created, you can create additional item information for the item from the [Work with Items Screen](#) or using [Working with Retail Integration Item Upload \(RIIU\)](#).

How to display this screen: Select *Copy* for an item on the *Work with Items Screen*.

Field	Description
From item	The item number and description of the item whose item information you wish to copy to a new item in the same company. Item number: Alphanumeric, 12 positions; display-only. Item description: Alphanumeric, 120 positions; display-only.
To item	The item number you wish to create, using the item information defined for the from item. An error message indicates if you enter an item number that already exists in the current company: <i>Item already exists</i> . Alphanumeric, 12 positions; required.
To item description	(Unlabeled field to the right of the To item field.) A description of the newly created item.



Note:

Not all screens or reports will display the full description if it exceeds the available space for this field.

L/S style	Alphanumeric, 120 positions; required. The long SKU style defined for the newly created item.



Note:

Included only if the *Require L/S Style (I94)* system control value is selected.

An error message indicates if you enter a long SKU style that is already assigned to another item: *L/S Style must be unique*.
If the *Require L/S Style (I94)* system control value is unselected, the system copies the long SKU style from the copied item.
Alphanumeric, 20 positions; required.

Copy Item Process

Complete the following steps to copy item information from one item to a newly created item in the current company.

1. Enter the item number and description of the item you wish to create in the *To item* and *To item description* fields.
2. If the *Require L/S Style (I94)* system control value is selected, enter a unique long SKU style code in the *L/S style* field.
3. Select *OK*. The system presents the current screen flow required to create an item and performs existing screen validation.

**Note:**

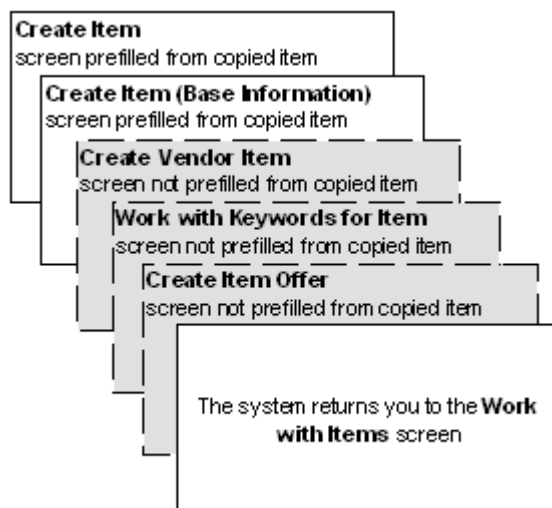
Unlike most other fields, the *L/S Subclass* does not default from the original item. You need to enter the L/S Subclass manually if the *Use Retail Integration (H26)* system control value is selected.

The screen flow varies, depending on whether you are creating a non-SKUed item or SKUed item. Additionally, the *Item Creation Values (J08)* umbrella system control value contains system control values that control which screens automatically display when you are creating an item.

Non-SKUed item screen flow: The system automatically advances you through the following screens if the item you are copying is a non-SKUed item.

1. *Create Item Screen*. The information on this screen defaults from the copied item; however, you can change any value.
2. *Create Item (Base Information) Screen*. The information on this screen defaults from the copied item; however, you can change any value.
3. *Create Vendor Item Screen* (only if the *Auto Advance to Vendor Item Create (E78)* system control value is selected). The information on this screen does not default from the copied item.
4. *First Work with Keywords for Item Screen* (only if the *Create Keywords at Item Entry (F78)* system control value is selected). The information on this screen does not default from the copied item.
5. *Create Item Offer Screen* (only if the *Auto Advance to Item Offer (J05)* system control value is selected). The information on this screen does not default from the copied item.

Once you have completed creating the item, based on copied item information, the system returns you to the *Work with Items Screen*.



SKUed item screen flow: The system automatically advances you through the following screens if the item you are copying is a SKUed item.

1. *Create Item Screen*. The information on this screen defaults from the copied item; however, you can change any value.

2. [First Work with Keywords for Item Screen](#) (only if the [Create Keywords at Item Entry \(F78\)](#) system control value is *selected*). The information on this screen does not default from the copied item.
3. [Create Item Offer Screen](#) (only if the [Auto Advance to Item Offer \(J05\)](#) system control value is *selected*). The information on this screen does not default from the copied item.

Once you have completed creating the item, the system returns you to the [Work with Items Screen](#). Every SKU defined for the copied item is automatically created for the new item.

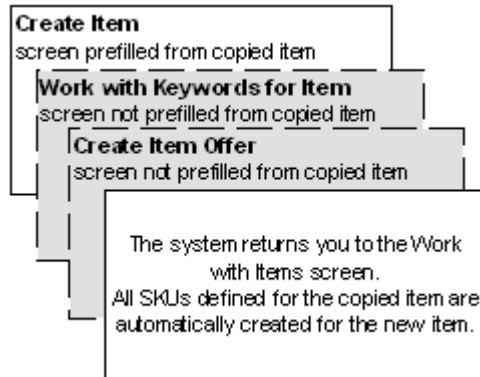


Table updates: The system copies the Item record and SKU record when you copy item information from one item to a newly created item. However, the following fields are not copied.

- [Item table](#)
- [SKU table](#)

Item table

Field	Comments
ITM number	From the To item field on the Copy Item Window .
Last phy date	Remains blank.
Last purchase cost	Remains blank.
Long SKU style	If the Require L/S Style (I94) system control value is selected, from the L/S style field on the Copy Item Window . If the Require L/S Style (I94) system control value is unselected, defaults from copied item.
Description	From the To item description field on the Copy Item Window .
Last change date	Defaults to current date.
Date last extract	Remains blank.
Last ecomm info chg	Remains blank.
Download processed	Remains blank.
Create date	Defaults to current date.
Updated by user	Defaults to current user.
Creation user	Defaults to current user.

SKU table

Field	Comments
ITM number	From the To item field on the Copy Item Window .
SKU code	The system copies all SKUs defined for the copied item to the newly created item.
Last purchase cost	Remains blank.
Cub val	Remains blank for non-SKU'ed items; copied for SKU'ed items.
Height override	Remains blank for non-SKU'ed items; copied for SKU'ed items.
Length override	Remains blank for non-SKU'ed items; copied for SKU'ed items.
Makeup date	Remains blank.
Qty order direct ship	Remains blank.
Receipt date	Remains blank.
Out of stock date	Remains blank.
Selling weight override	Remains blank for non-SKU'ed items; copied for SKU'ed items.
Short SKU	System generated unique number.
Times out of stock	Remains blank.
Times picked	Remains blank.
Weight override	Remains blank for non-SKU'ed items; copied for SKU'ed items.
Width override	Remains blank for non-SKU'ed items; copied for SKU'ed items.
D.F.O. (date of first order)	Remains blank.
D.L.O. (date of last order)	Remains blank.
Orders avail pick gen	Remains blank.
SKU open qty	Remains blank.
Future qty	Remains blank.
Suspense qty	Remains blank.
On hold qty	Remains blank.
SKU average cost	Defaults to the cost from the Cost field on the Create Item screen, not the cost defined for the copied item.
Drop ship avail qty	Remains blank.
L/S style	If the <i>Require L/S Style (I94)</i> system control value is selected, the system concatenates the item number + SKU code; for example ITEM RED WMNS SMLL. If the <i>Require L/S Style (I94)</i> system control value is unselected, defaults from copied item.
Last download qty	Remains blank.
Last extract	Remains blank.

Field	Comments
Last ecomm info chg	Remains blank.
Last changed date	Remains blank.
SKU create date	Defaults to the current date.
CTN ID # (SKU)	Remains blank for non-SKU'ed items; copied for SKU'ed items.
UOM	Remains blank for non-SKU'ed items; copied for SKU'ed items.
Element 1	Remains blank for non-SKU'ed items; copied for SKU'ed items.
Element 2	Remains blank for non-SKU'ed items; copied for SKU'ed items.
Element 3	Remains blank for non-SKU'ed items; copied for SKU'ed items.

Copy Item to Company Window

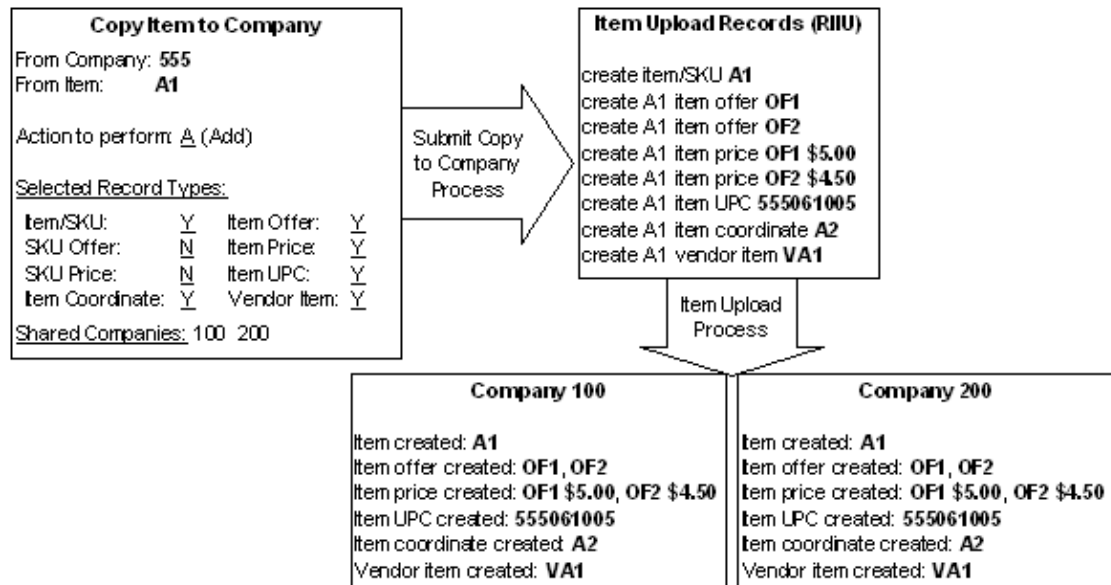
Purpose: Use this window to create an item upload record in the [RI Item Upload Table \(RIIUPP\)](#) in order to add or change item information for an item with the same item number as the copied item in each shared company.

Once the system creates the item upload record, the system follows the regular [RI Item Upload Process](#) to process the record. If the record contains errors, the system places the record in the [Working with Retail Integration Item Upload \(RIIU\)](#) menu option in the shared company where you can review, correct, and reprocess the record.

Copy Item to Company allows you to maintain inventory in the parent company and copy the item information over to your shared companies.

Example:

- When you create item A1 in the parent company, you can copy A1, including its offers, prices, UPC, coordinates, and vendor items, over to the shared companies.
- When you change item A1 in the parent company, you can copy the item updates to item A1 in the shared companies.



How to display this screen: Select *Copy to Company* for an item at the [Work with Items Screen](#).

When you select this option:

- An error message indicates if you do not have authority to the [Copy Item to Company Security \(B15\)](#) secured feature: Not authorized to Copy.
- An error message indicates if shared companies do not exist for the current company: Shared companies do not exist for the parent. You can define shared companies for a company in [Working with Companies \(WCMP\)](#).

The system defaults the settings selected the last time the window was accessed; however, you can change the settings.

Field	Description
From company	A code for the company where the copied item is located. This represents a parent company that is associated with one or more shared companies. Numeric, 3 positions; display-only.
From item	The item number and description of the copied item. Item number: Alphanumeric, 12 positions; display-only. Item description: Alphanumeric, 120 positions; display-only.

Field	Description
Action to perform	Indicates the type of item upload record you wish to create in the RI Item Upload Table (RIIUPP). • A = The system creates an item upload record with a Request type of A (add), indicating the system creates the item information in the shared company. However, if the system finds a record in the Order Administration database that matches the information in the RI Item Upload record, the system updates the existing record. • C = The system creates an item upload record with a Request type of C (maintain), indicating the system updates the item information in the shared company. However, if the system cannot find a record in the Order Administration database that matches the information in the RI Item Upload record, the system creates a new record. Alphanumeric, 1 position; required. Select record types You must specify the type of item information you wish to populate in the item upload record, using the item information defined for the copied item, by selecting at least one of the following fields. For each record type selected, the system copies the item information from the copied item and creates an item upload record for each shared company. • Item/SKU • Item offer • SKU offer • Item price • SKU price • Item UPC • Item coordinate • Vendor item If you do not select at least one of the record type fields, an error message indicates: At least one record type required. <i>Example:</i> If you wish to create the copied item in each shared company, enter A in the Action to perform field and select each Record type field. The system will copy all item information for the copied item and create the item in each shared company.

 Note:

The system does not validate that the record type you select to copy exists for the copied item. If the selected item information does not exist, the system submits the Copy Item to Company process, but does not create an item upload record for that record type.

Field	Description
Item/SKU	Indicates whether the system creates an item upload record for record type 01 (item/SKU) in the <i>RI Item Upload Table (RIIUPP)</i> for each shared company, using the item/SKU information defined for the copied item. <i>Selected</i> = The system creates a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 01 (item/SKU) for each shared company, using the item/SKU information defined for the copied item. See Item upload records created for record type Item/SKU for more information on the type of item upload record created, based on the action code and record type selected, and the expected results in the shared company. <i>Unselected</i> = Do not create a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 01 (item/SKU).
Item offer	Indicates whether the system creates an item upload record for record type 03 (item offer) in the <i>RI Item Upload Table (RIIUPP)</i> for each shared company, using the item offer information defined for the copied item. <i>Selected</i> = The system creates a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 03 (item offer) for each shared company, using the item offer information defined for the copied item. See Item upload records created for record type Item Offer for more information on the type of item upload created, based on the action code and record type selected, and the expected results in the shared company. <i>Unselected</i> = Do not create a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 03 (item offer).
SKU offer	Indicates whether the system creates an item upload record for record type 04 (SKU offer) in the <i>RI Item Upload Table (RIIUPP)</i> for each shared company, using the SKU offer information defined for the copied item. <i>Selected</i> = The system creates a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 04 (SKU offer) for each shared company, using the SKU offer information defined for the copied item. See Item upload records created for record type SKU Offer for more information on the type of item upload created, based on the action code and record type selected, and the expected results in the shared company. <i>Unselected</i> = Do not create a record in the v for record type 04 (SKU offer).
Item price	Indicates whether the system creates an item upload record for record type 05 (item price) in the <i>RI Item Upload Table (RIIUPP)</i> for each shared company, using the item price information defined for the copied item. <i>Selected</i> = The system creates a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 05 (item price) for each shared company, using the item price information defined for the copied item. See Item upload records created for record type Item Price for more information on the type of item upload created, based on the action code and record type selected, and the expected results in the shared company. <i>Unselected</i> = Do not create a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 05 (item price).

Field	Description
SKU price	Indicates whether the system creates an item upload record for record type 06 (SKU price) in the <i>RI Item Upload Table (RIIUPP)</i> for each shared company, using the SKU price information defined for the copied item. • <i>Selected</i> = The system creates a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 06 (SKU price) for each shared company, using the SKU price information defined for the copied item. See Item upload records created for record type SKU Price for more information on the type of item upload created, based on the action code and record type selected, and the expected results in the shared company. • <i>Unselected</i> = Do not create a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 06 (SKU price).
Item UPC	Indicates whether the system creates an item upload record for record type 08 (item UPC) in the <i>RI Item Upload Table (RIIUPP)</i> for each shared company, using the item UPC information defined for the copied item. • <i>Selected</i> = The system creates a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 08 (item UPC) for each shared company, using the item UPC information defined for the copied item. See Item upload records created for record type Item UPC for more information on the type of item upload created, based on the action code and record type selected, and the expected results in the shared company. • <i>Unselected</i> = Do not create a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 08 (item UPC).
Item coordinate	Indicates whether the system creates an item upload record for record type 09 (item coordinate) in the <i>RI Item Upload Table (RIIUPP)</i> for each shared company, using the item coordinate information defined for the copied item. • <i>Selected</i> = The system creates a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 09 (item coordinate) for each shared company, using the item coordinate information defined for the copied item. See Item upload records created for record type Item Coordinate for more information on the type of item upload created, based on the action code and record type selected, and the expected results in the shared company. • <i>Unselected</i> = Do not create a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 09 (item coordinate).
Vendor item	Indicates whether the system creates an item upload record for record type 07 (vendor item) in the <i>RI Item Upload Table (RIIUPP)</i> for each shared company, using the vendor item information defined for the copied item. • <i>Selected</i> = The system creates a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 07 (vendor item) for each shared company, using the vendor item information defined for the copied item. See Item upload records created for record type Vendor Item for more information on the type of item upload created, based on the action code and record type selected, and the expected results in the shared company. • <i>Unselected</i> = Do not create a record in the <i>RI Item Upload Table (RIIUPP)</i> for record type 07 (vendor item).

Field	Description
Shared companies	The shared companies for which the system will create an item upload record, based on the action code and record types selected. Up to 10 shared companies display in company number sequence. A plus sign (+) indicates if more shared companies exist. You can select <i>Shared Comp</i> to view a complete list of the shared companies for which an item upload record will be created. Numeric, 3 positions; display-only.

Screen Option	Procedure
Submit the copy item to company process to create item upload records in the <i>RI Item Upload Table (RIIUPP)</i> for each shared company, based on the action code and record types selected	Select <i>Accept</i>. The system returns you to the Work with Items Screen with a message similar to the following: Copy Item To Company program has been submitted to batch. See <i>Copy Item to Company Process</i> for the steps the system performs.
Review a list of shared companies for which the system will create an item upload record, based on the action code and record types selected	Select <i>Shared Comp</i> to advance to the Shared Companies window.

 Note:

You cannot add, change, or delete shared companies at this window. You can define shared companies for a company in [Working with Companies \(WCMP\)](#).

Copy Item to Company Process

Instructions: Complete the following steps to create an item upload record in the *RI Item Upload Table (RIIUPP)* in order to add or change item information for an item with the same item number as the copied item in each shared company, based on the action code and record types selected at the [Copy Item to Company Window](#).

#	Step
1.	In the Action to perform field, indicate the type of item activity you wish to perform. • <i>A</i> = The system creates an item upload record with a Request type of <i>A</i> (add), indicating the system creates the item information in the shared company. However, if the system finds a record in the Order Administration database that matches the information in the <i>RI Item Upload</i> record, the system updates the existing record. • <i>C</i> = The system creates an item upload record with a record type of <i>C</i> (maintain), indicating the system updates the item information in the shared company. However, if the system cannot find a record in the Order Administration database that matches the information in the <i>RI Item Upload</i> record, the system creates a new record.

#	Step
2.	Select the record types you wish to create. This represents the item information you wish to create or update, based on the specified action code. See: • Item upload records created for record type Item/SKU • Item upload records created for record type Item Offer • Item upload records created for record type SKU Offer • Item upload records created for record type Item Price • Item upload records created for record type SKU Price • Item upload records created for record type Item UPC • Item upload records created for record type Item Coordinate • Item upload records created for record type Vendor Item
3.	Select Accept. The system returns you to the Work with Items Screen with a message similar to the following: Copy Item To Company program has been submitted to batch.
4.	The system creates item upload records in the <i>RI Item Upload Table (RIIUPP)</i>, based on the action code and record types selected. Each item upload record is created with: • A Key type of <i>IT</i> (item/SKU), indicating the system identifies the item in the shared company using the Item and SKU fields in the item upload record. The Copy Item to Company program populates these fields with the item number and optionally, SKU code, defined for the copied item. • A Status of <i>U</i> (unprocessed), indicating the item upload record is ready to be processed.
5.	Once the Copy Item to Company program has created all of the item upload records, the system automatically submits the RI Item Upload process to process the records in the <i>RI Item Upload Table (RIIUPP)</i>. See RI Item Upload Process for processing details.
	 Note: If item upload records already exist in the RI Item Upload table, the system processes those records along with the records created through the Copy Item to Company program.
6.	The system creates supporting table values for items/SKUs through the item upload if the value does not exist in the shared company. For example, if the buyer code does not exist in the shared company, the system creates it. See Tables Updated by the RI Item Upload for a list of the tables for which the RI Item Upload process will create new records.

#	Step
9.	The system places any records that contain errors in an error status in the <i>RI Item Upload Table (RIIUPP)</i> and Retail Integration Item Upload Error table. You can review the records in error on the Item Upload Error Report and on the Work with Retail Item Upload Errors Screen in <i>Working with Retail Integration Item Upload (RIIU)</i> . See <i>Retail Item Upload Errors</i> for a list of errors that may occur.

 Note:

Item upload records in error are listed in the Work with Retail Integration Item Upload (RIIU) menu option in the shared company, not the company where the copied item is located. For example, if you create the copied item in shared companies 100 and 200 and both item upload records error, you must review and correct the item upload record in error in each shared company (companies 100 and 200).

10.	Once the Item Upload process completes, the system generates the following reports: • Item Upload Error Report: Indicates that item upload records failed one or more edits and remain in the Retail Integration Item Upload file. • Record Deleted from RI Item Upload Report: Indicates that you deleted the item upload record(s) from the Retail Integration Item Upload file by selecting <i>Delete</i> for an item upload record at the Work with Retail Item Upload Screen. This means that the edit program did not create, maintain, or delete any item/SKU information.

Item Upload Records Created

The table below indicates the type of item upload record created, based on the action code and record type selected.

Action / Record type	Item Upload Record Created

	Item upload records created for record type Item/SKU

Action / Record type	Item Upload Record Created
A Item/SKU	The item upload record contains: - Record type <i>01</i> (item/SKU), indicating the system populates the item and SKU fields in the item upload record using the item/SKU information defined for the copied item. See Fields for 01 Item/SKU record type for a list of the fields populated. - Request type <i>A</i> (add), indicating the system creates the item in the shared company. If the copied item contains SKUs, the system creates a separate item upload record for each item/SKU.

 Note:

If the item already exists in the shared company, the system automatically changes the Request type to *C* (maintain).

Short SKU: The system generates a new short SKU code for each item/SKU created in the shared company.

Long SKU department and long SKU division: The system creates the long SKU department in the shared company if it does not already exist. In addition, if a long SKU division is defined for the long SKU department being created, the system also creates the long SKU division in the shared company. However, if the long SKU department does not need to be created, the system will not create the long SKU division in the shared company if it does not already exist.

Cost: The system copies the cost defined.

****DFLT ITEM:** If a field for the copied item is blank, the system creates the item upload record and leaves the field blank. However, if the ****DFLT ITEM Item/SKU** exists as an item in the shared company, the system defaults the value defined for the ****DFLT ITEM** item to the blank field in the RI Item Upload record. For example, if the buyer code is blank from the copied item, but the ****DFTL ITEM** contains buyer code BTM, the system defaults BTM to the item upload record and creates the item in the shared company with buyer code BTM. See ****DFLT ITEM Item/SKU** for more information on setting up this item.

Item Upload Processing Results: The system creates an item/SKU in each shared company, using the item number and item/SKU information from the copied item. If the copied item contains SKUs, the system creates a SKU for each SKU defined for the copied item.

Action / Record type	Item Upload Record Created
C Item/SKU	The item upload record contains: - Record type <i>01</i> (item/SKU), indicating the system populates the item and SKU fields in the item upload record using the item/SKU information defined for the copied item. See Fields for 01 Item/SKU record type for a list of the fields populated. - Request type <i>C</i> (maintain), indicating the system updates the item in the shared company. If the copied item contains SKUs, the system creates a separate item upload record for each item/SKU. If the item does not exist, the system automatically changes the Request type to <i>A</i> (add). <i>Short SKU:</i> The system retains the short SKU defined for the item in the shared company instead of updating the short SKU with the short SKU defined for the copied item. <i>Long SKU department and long SKU division:</i> The system creates the long SKU department in the shared company if it does not already exist. In addition, if a long SKU division is defined for the long SKU department being created, the system also creates the long SKU division in the shared company. However, if the long SKU department does not need to be created, the system will not create the long SKU division in the shared company if it does not already exist. <i>Cost:</i> The system copies the cost defined for the item. <i>**DFLT ITEM item:</i> If a field for the copied item is blank, the system creates the item upload record and leaves the field blank. However, if <i>**DFLT ITEM</i> exists as an item in the shared company, the system defaults the value defined for the <i>**DFLT ITEM</i> item to the blank field in the item upload record. For example, if the buyer code is blank from the copied item, but the <i>**DFLT ITEM</i> contains buyer code BTM, the system defaults BTM to the item upload record and updates the item in the shared company with buyer code BTM. See **DFLT ITEM Item/SKU for more information on setting up this item. <i>*DFTCHG item:</i> If <i>*DFTCHG</i> exists as an item in the shared company, the system looks to this item to determine if the item in the shared company should be updated with the information from the copied item. - If a field in the <i>*DFTCHG</i> item is populated, the system does not update the item in the shared company with the value from the copied item. - If a field in the <i>*DFTCHG</i> item is blank, the system updates the item in the shared company with the value from the copied item. <i>Example:</i> If the copied item has buyer code TWB and the item in the shared company has buyer code BTM, the system will retain buyer code BTM if the <i>*DFTCHG</i> item has a buyer code defined. However, if the Buyer code field for the <i>*DFTCHG</i> item is blank, the system updates the buyer code for the item in the shared company to TWB. See **DFTCHG Item/SKU for more information on setting up this item. <i>Item Upload Processing Results:</i> In each shared company, the system updates the item/SKU with the same item number as the copied item, using the item/SKU information from the copied item. Item upload records created for record type Item Offer

Action / Record type	Item Upload Record Created
A Item Offer	The item upload record contains: - Record type 03 (item offer), indicating the system populates the item offer fields in the item upload record using the item offer information defined for the copied item. See Fields for 03 Item Offer record type for a list of the fields populated. - Request type A (add), indicating the system creates the item offer in the shared company. If the copied item contains SKUs, the system creates one item upload record for the main item only. If the item offer already exists in the shared company, the system automatically changes the Request type to C (maintain). <i>Item Upload Processing Results:</i> In each shared company, the system creates item offers for the item with the same item number as the copied item, using the item offers from the copied item.
C Item Offer	The item upload record contains: - Record type 03 (item offer), indicating the system populates the item offer fields in the item upload record using the item offer information defined for the copied item. See Fields for 03 Item Offer record type for a list of the fields populated. - Request type C (maintain), indicating the system updates the item offer in the shared company. If the copied item contains SKUs, the system creates one item upload record for the main item only. If the item offer does not exist in the shared company, the system automatically changes the Request type to A (add). <i>Item Upload Processing Results:</i> In each shared company, the system updates the item offer(s) for the item with the same item number as the copied item, using the item offer information from the copied item.
Item upload records created for record type SKU Offer	
A SKU Offer	The item upload record contains: - Record type 04 (SKU offer), indicating the system populates the SKU offer fields in the item upload record using the SKU offer information defined for the copied item. See Fields for 04 SKU Offer record type for a list of the fields populated. - Request type A (add), indicating the system creates the SKU offer in the shared company. The system creates a separate item upload record for each item/SKU. If the SKU offer already exists in the shared company, the system automatically changes the Request type to C (maintain).

 Note:

In order to create an item upload record for Record type 04, the copied item must contain SKUs. If the item is a non-SKUed item, the system automatically deletes the item upload record and displays it on the [Record Deleted from RI Item Upload Report](#).

Item Upload Processing Results: In each shared company, the system creates SKU offers for the item with the same item number as the copied item, using the SKU offers from the copied item.

Action / Record type	Item Upload Record Created
C SKU Offer	The item upload record contains: - Record type 04 (SKU offer), indicating the system populates the SKU offer fields in the item upload record using the SKU offer information defined for the copied item. See Fields for 04 SKU Offer record type for a list of the fields populated. - Request type C (maintain), indicating the system updates the SKU offer in the shared company. If the copied item contains SKUs, the system creates a separate item upload record for each item/SKU. If the SKU offer does not exist, the system automatically changes the Request type to A (add). <i>Item Upload Processing Results:</i> In each shared company, the system updates the SKU offer(s) for the item with the same item number as the copied item, using the SKU offer information from the copied item. Item upload records created for record type Item Price
A Item Price	The item upload record contains: - Record type 05 (item price), indicating the system populates the item price fields in the item upload record using the item price information defined for the copied item. See Fields for 05 Item Price record type for a list of the fields populated. - Request type A (add), indicating the system creates the item price in the shared company. If the copied item contains SKUs, the system creates one item upload record for the main item only for each item price. If the item price already exists in the shared company, the system automatically changes the Request type to C (maintain). <i>Item Upload Processing Results:</i> In each shared company, the system creates item prices for the item with the same item number as the copied item, using the item prices from the copied item.
C Item Price	The item upload record contains: - Record type 05 (item price), indicating the system populates the item price fields in the item upload record using the item price information defined for the copied item. See Fields for 05 Item Price record type for a list of the fields populated. - Request type C (maintain), indicating the system updates the item price in the shared company. If the copied item contains SKUs, the system creates a separate item upload record for each item/SKU. If the item price does not exist, the system automatically changes the Request type to A (add). <i>Item Upload Processing Results:</i> In each shared company, the system updates the item price(s) for the item with the same item number as the copied item, using the item price information from the copied item. Item upload records created for record type SKU Price

Action / Record type	Item Upload Record Created
A SKU Price	The item upload record contains: - Record type 06 (SKU price), indicating the system populates the SKU price fields in the item upload record using the SKU price information defined for the copied item. See Fields for 06 SKU Price record type for a list of the fields populated. - Request type A (add), indicating the system creates the SKU price in the shared company. If the copied item contains SKUs, the system creates a separate item upload record for each item/SKU. If the SKU price already exists in the shared company, the system automatically changes the Request type to C (maintain). <i>Item Upload Processing Results:</i> In each shared company, the system creates SKU prices for the item with the same item number as the copied item, using the SKU prices from the copied item.
C SKU Price	The item upload record contains: - Record type 06 (SKU price), indicating the system populates the SKU price fields in the item upload record using the SKU price information defined for the copied item. See Fields for 06 SKU Price record type for a list of the fields populated. - Request type C (maintain), indicating the system updates the SKU price in the shared company. If the copied item contains SKUs, the system creates a separate item upload record for each item/SKU. If the SKU price does not exist, the system automatically changes the Request type to A (add). <i>Item Upload Processing Results:</i> In each shared company, the system updates the SKU price(s) for the item with the same item number as the copied item, using the SKU price information from the copied item.
Item upload records created for record type Item UPC	
A Item UPC	The item upload record contains: - Record type 08 (item UPC), indicating the system populates the item UPC fields in the item upload record using the item UPC information defined for the copied item. See Fields for 08 Item UPC record type for a list of the fields populated. - Request type A (add), indicating the system creates the item UPC in the shared company. If the copied item contains SKUs, the system creates a separate item upload record for each item/SKU. If the item UPC already exists in the shared company, the system automatically changes the Request type to C (maintain). <i>Item Upload Processing Results:</i> In each shared company, the system creates item UPCs for the item with the same item number as the copied item, using the item UPCs from the copied item.
C Item UPC	The item upload record contains: - Record type 08 (item UPC), indicating the system populates the item UPC fields in the item upload record using the item UPC information defined for the copied item. See Fields for 08 Item UPC record type for a list of the fields populated. - Request type C (maintain), indicating the system updates the item UPC in the shared company. If the copied item contains SKUs, the system creates a separate item upload record for each item/SKU. If the item UPC does not exist, the system automatically changes the Request type to A (add). <i>Item Upload Processing Results:</i> In each shared company, the system updates the item UPC(s) for the item with the same item number as the copied item, using the item UPC information from the copied item.

Action / Record type	Item Upload Record Created
Item upload records created for record type Item Coordinate	
A Item Coordinate	The item upload record contains: - Record type 09 (item coordinate), indicating the system populates the item coordinate fields in the item upload record using the item coordinate information defined for the copied item. See Fields for 09 Item Coordinate record type for a list of the fields populated. - Request type A (add), indicating the system creates the item coordinate in the shared company. If the copied item contains SKUs, the system creates a separate item upload record for each item/SKU. If the item coordinate already exists in the shared company, the system automatically changes the Request type to C (maintain). <i>Item Upload Processing Results:</i> In each shared company, the system creates item coordinates for the item with the same item number as the copied item, using the item coordinates from the copied item.
C Item Coordinate	The item upload record contains: - Record type 09 (item coordinate), indicating the system populates the item coordinate fields in the item upload record using the item coordinate information defined for the copied item. See Fields for 09 Item Coordinate record type for a list of the fields populated. - Request type C (maintain), indicating the system updates the item coordinate in the shared company. If the copied item contains SKUs, the system creates a separate item upload record for each item/SKU. If the item coordinate does not exist, the system automatically changes the Request type to A (add). <i>Item Upload Processing Results:</i> In each shared company, the system updates the item coordinate(s) for the item with the same item number as the copied item, using the item coordinate information from the copied item.
Item upload records created for record type Vendor Item	
A Vendor Item	The item upload record contains: - Record type 07 (vendor item), indicating the system populates the vendor item fields in the item upload record using the vendor item information defined for the copied item. See Fields for 07 Vendor Item record type for a list of the fields populated. - Request type A (add), indicating the system creates the vendor item in the shared company. If the copied item contains SKUs, the system creates a separate item upload record for each item/SKU. If the item coordinate already exists in the shared company, the system automatically changes the Request type to C (maintain). <i>Item Upload Processing Results:</i> In each shared company, the system creates vendor items for the item with the same item number as the copied item, using the vendor items from the copied item.

Action / Record type	Item Upload Record Created
C Vendor Item	The item upload record contains: - Record type 07 (vendor item), indicating the system populates the vendor item fields in the item upload record using the vendor item information defined for the copied item. See Fields for 07 Vendor Item record type for a list of the fields populated. - Request type C (maintain), indicating the system updates the vendor item in the shared company. If the copied item contains SKUs, the system creates a separate item upload record for each item/SKU. If the vendor item does not exist, the system automatically changes the Request type to A (add). <i>Item Upload Processing Results:</i> In each shared company, the system updates the vendor item(s) for the item with the same item number as the copied item, using the vendor item information from the copied item.

Setting up SKUs

Purpose: The following topics describe working with SKU elements, groups, split SKUs, and using the SKU generator.

- [Introducing SKU Setup](#) discusses SKU concepts and provides an overview of split SKU elements, groups, and the SKU generator.
- [Working with SKU Elements \(WSK1, WSK2, WSK3\)](#) explains how to create, change, delete, and display SKU elements.
- [Working with SKU Groups \(WISG\)](#) includes how to create, change, delete, and display SKU groups.
- [Using the SKU Generator \(ESKG\)](#) describes the SKU Generator and working with input and output screens, including working with SKU base information and creating individual SKUs.
- [Resequence the SKU Collating Sequence Number \(RSCS\)](#) explains how to assign a SKU sort sequence number to each SKU of a selected item.

Introducing SKU Setup

Purpose: This topic contains an explanation of SKUs, SKU types, SKU elements, SKU groups, SKU sort sequence numbers and the SKU generator.

Definition: A SKU (stock keeping unit) is used to further define an item number. An item that is sold in multiple colors and sizes is often represented by a base item number, which is common to all of the colors and sizes, and a SKU which specifically defines the color and size. For example, the base item number for a dress could be 9201 and the SKUs associated with that item number could be RED SML, RED MED, RED LRG, BLUE SML, BLUE MED, and BLUE LRG.

Most functions accessible at the base item level are accessible at the SKU level, including offers, warehouses, sets, and comments. Information entered at the SKU level overrides information defined at the base item level.

In this topic:

- [SKU Elements](#)

- [SKU Groups](#)
- [SKU Generator](#)

SKU Elements

The three elements of the Split SKU are defined in the System Control table. Typically, these elements are used to represent size, color, and width for items of apparel; however, you can define the elements to meet your particular requirements. Once you set up the elements in the System Control table, you will be prompted for this information throughout the system.

SKU Groups

A SKU Group ([Working with SKU Groups \(WISG\)](#)) can be assigned to an item in the Item table and is used to define the standard sizes or colors in which items are sold. SKU Groups can be used to facilitate data entry in the SKU Generator (fast path = *ESKG*); see [Using the SKU Generator \(ESKG\)](#).

For example, a SKU group can be defined for a particular manufacturer's product line for dresses. You can define an Item SKU Group for dress size. For example, the Item SKU Group 001 could be set up for dresses and can list the sizes in which these dresses are available (4, 6, 8, 10, 12, 14, regular and petite).

SKU Generator

The SKU Generator is used to create an array of SKUs for an item automatically. Once you define the item and the SKU group, run the SKU generator option to automatically build all the SKU records.

When generating SKUs for an item, you can accept the defaults as defined in the SKU Groups or you can add or subtract individual SKUs.

See [Using the SKU Generator \(ESKG\)](#).



Note:

Before you can work with SKUs, you must create the SKU information on the system. You can also create SKUs by selecting *Create* at the [Work with SKUs Screen](#).

Working with Sets

In this part: The following topics describe how to create, change, delete, and display sets.

- [Introducing Sets](#) provides a brief overview of sets and how to select the set tables.
- [Entering Set Information \(WSET\)](#) describes a set; how to scan for, create, and delete sets; and how to work with set component items.
- [Entering Variable Set Information \(WVST\)](#) defines a variable set and includes how to scan for, create, and delete variable sets, and how to work with variable set groups.
- [Entering Finished Goods Information \(WFGD\)](#) defines a finished good and includes how to scan for, create, and delete finished goods sets, and how to work with finished good component items.

Introducing Sets

Purpose: There are three types of sets or kits:

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

For more information: See [Entering Set Information \(WSET\)](#).

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

For more information: See [Entering Variable Set Information \(WVST\)](#).

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

For more information: See [Entering Finished Goods Information \(WFGD\)](#).

Updating Items and SKUs

Topics in this part:

- [Creating Item/SKU Offers \(MISO\)](#) describes how to create an item/SKU offer.
- [Updating Item/SKU Offers \(MUSO\)](#) explains the Update SKU Offer screen and its fields. This option updates information on multiple SKU offer records at one time.
- [Deleting SKUs for an Item \(MDLT\)](#) explains how to delete a SKU for a particular item.
- [Copying SKU Offer Information \(MCSO\)](#) describes how to duplicate the information in one offer to another offer.
- [Copying Item Warehouse Information \(MCIW\)](#) explains how to duplicate the item warehouse information in one warehouse to another warehouse.
- [Working with Offer Overrides by Item Class \(WSOI\)](#) explains how to override existing item/offer and SKU/offer information by item class.
- [Maintaining SKU Cross Reference Codes \(MSKR\)](#) describes how to create a cross reference between a Order Administration item and SKU and another system's item and SKU.
- [Updating SKU Offer Prices \(MUSK\)](#) allows you to create SKU/offer prices for specific SKUs of an item and specific offers.
- [Maintaining Item/SKU/Offer \(CPIM\)](#) describes how to recalculate the projected units or update other information in the Item/Offer table.
- [Maintaining Item Offers \(MIOF\)](#) describes how to update item offer information for a specific offer, or to change item information for a specific item.
- [Copying SKU/Offer Records \(CSKO\)](#) describes how to copy SKU offer information from one offer to another.

Assigning Items/SKUs to Offers

Purpose: By assigning an item or SKU to an offer, you indicate that the item or SKU is available to be sold in a particular offer. An item/SKU can be linked to multiple offers. The information you can define for the item/SKU offer includes the page number where the item/SKU appears, information on the item depiction, whether gift wrapping or special handling are available, and the expected return percentage. You can also define pricing at this level.

Item/offer vs. SKU/offer: If an item has SKUs, you can create an item offer record or SKU offer records. You need to establish SKU offer records only if the information differs for each SKU.

Use Work with Item/SKU Offers to change, delete, display, or create item/SKU offers. Additionally, you can advance to the following functions:

1. *Item pricing:* You can define special reduced prices for the item, based on the quantity ordered or the column assignment.
2. *Page letter assignment:* You can define a catalog page and letter for an item, which order entry operators can enter instead of the item code.
3. *Alias function:* You can use aliases to track sales for an item depending on its placement within the same catalog.

Created through SKU generator? The [Automatically Create SKU Offers \(J71\)](#) system control value indicates whether the SKU generator automatically creates SKU Offers and single-unit SKU Prices based on current or future Item Offers and Item Prices. See that system control value for more information.

In this topic:

- [Work with Item Offers Screen](#)
 - [Change Item Offer Screen](#)
- [Work with SKU Offers Screen](#)
 - [Change SKU Offer Screen](#)
- [Work with Item Prices Screen \(Quantity Price Breaks by Offer\)](#)
 - [Create Item Price Screen \(Quantity Price Breaks by Offer\)](#)
 - [Change Item Price Screen](#)
- [Work with Alias Screen](#)
 - [Create Alias Screen](#)
- [Work with Accompanying Item Screen](#)

For more information: See [Create Item Offer Screen](#) to learn how to create an item (or SKU) offer.

Work with Item Offers Screen

Purpose: Item offers are merchandise presentations to your customers, such as catalogs, space advertisements, etc. Use this screen to associate an item with one or more offers. From this screen, you can create, change, delete or display item offers.

How to display this screen: At the [Work with Items Screen](#), select *Offers* for an item.

Field	Description
Offer	Represents a catalog or advertisement used to present merchandise to your customers. Alphanumeric, 3 positions; optional.
Description	The description of the offer. Alphanumeric, 40 positions; optional.
G/W (Gift wrap)	Indicates whether the item is eligible for gift wrapping in the offer. <i>Selected</i> = the item is eligible for gift wrapping in this offer <i>Unselected</i> = the item is not eligible for gift wrapping in this offer
S/H (Special handling)	Indicates whether the item is eligible for special handling in the offer. <i>Selected</i> = the item is eligible for special handling in this offer <i>Unselected</i> = the item is not eligible for special handling in this offer

Screen Option	Procedure
Create an item offer	Select <i>Create</i> to advance to the Create Item Offer Screen .
Change item offer information	Select <i>Change</i> for an offer to advance to the Change Item Offer Screen .
Delete item offer information	Select <i>Delete</i> for an offer to delete the item/offer.

 Note:

If there are dependent records associated with this offer, the system will display a warning message. Deleting this offer will also delete any dependent records such as:

Item Offer Dependent Tables:

- Item Price
- Page Letter Alias

SKU Offer Dependent Tables:

- SKU Price
- SKU Offer Page
- SKU Offer Charges

Display item offer information	Select <i>Display</i> for an offer to advance to the Display Item Offer Screen. You cannot change any information on this screen. See <i>Create Item Offer Screen</i> for field descriptions.
Price Breaks	Select <i>Price breaks</i> for an offer to advance to the Work with Item Prices Screen (Quantity Price Breaks by Offer) .
Alias	Select <i>Alias</i> for an offer to advance to the Work with Alias Screen .

Screen Option	Procedure
Work with accompanying items	Select <i>Accompanying Items</i> for an offer to display the Work with Accompanying Item Screen .
Work with user defined fields	Select <i>User Fields</i> for an offer to advance to the Work with User Fields Screen .

Change Item Offer Screen

Change an offer: Select *Change* for the item/SKU offer at the [Work with Item Offers Screen](#) to advance to the Change Item/SKU Offer screen. At this screen you can change any information except the item code, description, and offer number. See [Create Item Offer Screen](#) for field descriptions.

If you change the effective date or pricing, the system creates an *additional* price break record for a quantity of 1. In this case, the system selects the most current price break for the item or SKU; the price break with the effective date closest to, but not past, the current date is used. To remove a price break record once you change any of this information for an item offer or SKU offer, select *Price breaks* for the item/SKU offer; see [Work with Item Prices Screen \(Quantity Price Breaks by Offer\)](#).

Work with SKU Offers Screen

Purpose: Use this screen to work with SKU/offers, which define the pricing and available options, such as gift wrap and special handling, for individual SKUs within an offer. If you have defined a SKU/offer, the system uses this information in order entry. If there is no SKU/offer, the item/offer information applies. It is not necessary to create SKU/offers for SKU'ed items except, optionally, to override the item/offer information.

How to display this screen: Select *Ofrs* for a SKU at the [Work with SKUs Screen](#).

Field descriptions: See [Work with Item Offers Screen](#).

Screen Option	Procedure
Create a SKU offer	Select <i>Create</i> to advance to the Create SKU Offer Screen .
Change SKU offer information	Select <i>Change</i> for an offer to advance to the Change SKU Offer screen. See Change Item Offer Screen .
Delete SKU offer information	Select <i>Delete</i> for an offer to delete the SKU offer.
Display SKU offer information	Select <i>Display</i> for an offer to advance to the Display SKU Offer screen. You cannot change any information on this screen. See Create SKU Offer Screen .
Price Breaks	Select <i>Price breaks</i> for an offer to advance to the Work with SKU Prices screen. See Work with Item Prices Screen (Quantity Price Breaks by Offer) .

Screen Option	Procedure
Work with accompanying items	Select <i>Accompanying Items</i> for an offer to display the Work with Accompanying Item Screen .
 Note: If you add an accompanying item from the Work with SKU Offers Screen, the accompanying item is added to the order only when the customer orders this specific SKU.	
Work with user defined fields	<i>User Fields</i> for an offer to advance to the Work with User Fields Screen .

Change SKU Offer Screen

To change: Select *Change* for an offer at the [Work with SKU Offers Screen](#) to advance to the Change SKU Offer screen. At this screen, you can change anything except the item, SKU, and offer. See [Create SKU Offer Screen](#).

Work with Item Prices Screen (Quantity Price Breaks by Offer)

Purpose: Use this screen to create, change, delete, or display price breaks for an item in an offer. The [Quantity Break/Item \(A87\)](#) system control value controls whether the system reprices an order by the Quantity Break by Item method in Order Entry.

This function also allows you to specify a pricing column for each price break. A customer assigned to a pricing column in the Customer table receives the price break automatically, regardless of the order quantity. You can establish separate price breaks by quantity for regular and associate customers.

Note:

If you have selected “Best Way” pricing in the System Control table, the customer will always receive the best available price for the item and quantity. If the best available price is a column price, the customer receives this price even if not flagged for column pricing.

Creating Item Price or SKU Price records through Item Offer or SKU Offer: You create a record in the Item Price table each time you create *or change* an item offer record that includes a price; similarly, you create a record in the SKU price table each time you create *or change* a SKU offer record with a price. Also, if you create a SKU Offer but do not specify an Effective date and Price at that time, the system automatically creates a SKU Price using the single-unit Item Price record with the latest Effective date. If the latest Item Price record has an Effective date in the future, then the SKU Price also has a future Effective date.

How to display this screen: At the [Work with Item Offers Screen](#), select *Price break* for an item offer.

Field	Description
Effective date	The date the price or quantity break discount becomes valid. Numeric, 6 positions (in user date format); optional.
Quantity	The amount of an item that the customer must order to receive the discounted (quantity break) price. Numeric, 7 positions; optional.
Price	The price at which the item will be sold. Numeric, 13 positions with a 2-place decimal; required.
Associate price	The price at which the item will be sold to associate customers. Numeric, 13 positions with a 2-place decimal; required.
Column	Indicates the pricing column associated with this price. Alphanumeric, 1 position; optional.
Tax inclusive price	The price at which the item will be sold on orders subject to tax-inclusive pricing and VAT. Included only if the Tax Included in Price (E70) system control value is <i>selected</i> . Numeric, 13 positions with a 2-place decimal; optional.
Tax-inclusive associate price	The price at which the item will be sold to associate customers on orders subject to tax-inclusive pricing and VAT. Included only if the Tax Included in Price (E70) system control value is <i>selected</i> . Numeric, 13 positions with a 2-place decimal; optional.

Screen Option	Procedure
Create item pricing	Select <i>Create</i> to advance to the Change Item Price Screen .
Change item price information	Select <i>Change</i> for an item price to advance to the Change Item Price Screen .
Delete item price information	Select <i>Delete</i> for an item price to delete it.
Display item price information	Select <i>Display</i> for an item price to advance to the Display Item Price Screen. You cannot change any information on this screen. See Create Item Price Screen (Quantity Price Breaks by Offer) for field descriptions.

Create Item Price Screen (Quantity Price Breaks by Offer)

Purpose: At the [Work with Item Prices Screen \(Quantity Price Breaks by Offer\)](#), select *Create*.

Field	Description
Effective date	The date the price or quantity break discount becomes valid. This date should be equal to or greater than the effective date of the offer. The customer will receive the price when the order date is on or after this date and the appropriate quantity ordered is achieved. If there are multiple effective dates established for the same item/offer, the system will use the price associated with the effective date closest to, but not greater than, the order date. <i>Example:</i> If you establish effective dates of Feb. 20, and Mar. 31 and the customer places an order on April 1, the customer receives the price associated with the effective date of March 31. Numeric, 6 positions (in user date format); required.
Qty (Quantity)	The amount of an item that the customer must order to receive the discounted (quantity break) price. Applies to all SKUs for the item unless it is overridden at the SKU level. An unlimited number of quantity break levels may be defined for an item. If you are defined as a single price record (meaning there is no minimum quantity required), use a quantity of one. Numeric, 7 positions; required.
Price	The price at which the item will be sold in this offer, if no discounts are applied, and the order date is on or after than the effective date. Multiple effective dates and prices can be established for the same item/offer. Numeric, 13 positions with a 2-place decimal; required.
Associate price	The price at which the item will be sold in this offer to associate customers. Associate price is used when the Associate field on the order is <i>selected</i> and the order date is on or after the effective date. Numeric, 13 positions with a 2-place decimal; optional.
Tax inclusive price	The price at which the item will be sold in this offer on orders subject to VAT. When an order is subject to VAT, tax does not accumulate in the Tax bucket on the order; instead, the customer pays a tax-inclusive price for the items and VAT is included as a "hidden tax" on the order detail line. Displayed only if the Tax Included in Price (E70) system control value is <i>selected</i>. Numeric, 13 positions with a 2-place decimal; optional.
Tax-inclusive associate price	The price at which the item will be sold in this offer to associate customers on orders subject to VAT. Displayed only if the Tax Included in Price (E70) system control value is <i>selected</i>. Numeric, 13 positions with a 2-place decimal; optional.
Price column	The pricing column associated with the price entered. In the Customer table, you may assign a customer to a pricing column. This means that the customer will be charged the column price, even if the customer does not order the number of units specified for the price break. Alphanumeric, 1 position; optional.

Change Item Price Screen

To change: Select *Change* for a price at the [Work with Item Prices Screen \(Quantity Price Breaks by Offer\)](#) to advance to the Change Item Price screen. At this screen you can change the prices or price column. See [Create Item Price Screen \(Quantity Price Breaks by Offer\)](#) for field descriptions.

Work with Alias Screen

Purpose: Use this screen to create, change, delete or display alternate item codes for an item. You can use various aliases for an item within an offer, presenting the item on different pages in different ways. This helps you track how different placement and presentation of an item within the catalog affects demand. The system maintains inventory information at the actual item level, not at the alias level.

If the [Display Item Alias \(D56\)](#) system control value is *selected*, the alias the customer selects will display in Order Entry, Order Maintenance, and Order Inquiry. If this field is *unselected*, the actual item code will display.



Note:

Note: If an item has SKUs, you define an alias for the base item rather than at the SKU level. Your customers can place orders for the item using the alias code, but the original SKUs. For example, a base item code is A1000, and is available in BLUE and RED, while it has aliases X2000 and Z3000. The system accepts orders for A1000, X2000 or Z3000, but requires a SKU of either BLUE or RED regardless of the item code or alias.

How to display this screen: At the [Work with Item Offers Screen](#), select *Alias* for an item offer. You can also advance to this screen by selecting *Work with Alias* at the [Create Item Offer Screen](#), the [Change Item Offer Screen](#), or the Display Item Offer screen.

Field	Description
Alias	The alternate item code for an actual item. Alphanumeric, 12 positions; optional.

Screen Option	Procedure
Create a new alias	Select <i>Create</i> to advance to the Create Alias Screen .
Change alias information	Select <i>Change</i> for an alias to advance to the Change Alias Screen. At this screen you can change any information except the item code and offer. See Create Alias Screen for field descriptions.
Delete alias information	Select <i>Delete</i> for an alias to delete it.
Display alias information	Select <i>Display</i> for an alias to advance to the Display Alias Screen. You cannot change any information on this screen. See Create Alias Screen for field descriptions.

Create Alias Screen

To create: At the [Work with Alias Screen](#), select *Create*.

Field	Description
Alias	The alternate item code for an actual item. You can create multiple aliases for an offer, but each alias must have a unique code. You can use aliases to track how demand varies for an item depending on placement and presentation within an offer. When you enter an alias code in Order Entry, the system reserves stock and performs all other inventory transactions against the actual item code, but tracks demand for the alias. If the Display Item Alias (D56) system control value is <i>selected</i>, the alias rather than the actual item code will display in Order Entry, Order Maintenance, and Order Inquiry. Alphanumeric, 12 positions; required.

Work with Accompanying Item Screen

Purpose: Use this screen to create, change, delete, or display additional items that are offered along with the original item and automatically added to the order.

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

The system also adds accompanying items to an order in order maintenance if the system control value is selected.

To define accompanying items: Use the *Add/Change* option at the [Work with Accompanying Item Screen](#) to define accompanying items for a specified item/SKU and offer. When you select the *Add/Change* option, the system toggles the fields for any existing accompanying items between being enterable and display-only.

For each accompanying item that you define, you must indicate:

- [Add Accompanying Items in Order Maintenance \(H28\)](#)
- the required order quantity of the originating item in order to add the accompanying item to the order; for example, you must order 2 of the originating item to add the accompanying item to the order
- the accompanying item/SKU to add to the order
- the quantity of the accompanying item to add to the order (either a specific quantity or the same quantity as the originating item)
- whether there is a charge for the accompanying item (accompanying items are added at no charge, or at the regular price according to your pricing hierarchy)

Cannot add accompanying item with set: The system does not add an accompanying item to the order if it is associated with a set item.

For more information: See [Upselling with Accompanying Items](#) for an overview of the accompanying item process in order entry and order maintenance.

How to display this screen: At the [Work with Item Offers Screen](#), select *Accompanying Item* for an item offer.

Field	Description
Offer	The code and description of offer that must be used for the originating item in order for the accompanying item to qualify for the order; this is the offer you selected at the Work with Item Offers Screen. Offer code: Alphanumeric, 3 positions; display-only. Offer description: Alphanumeric, 40 positions; display-only.
Item/SKU	The code and description of the originating item; this is the item that “triggers” adding the accompanying item to the order. If you are defining an accompanying item at the SKU level, the SKU for the originating item also displays. Item code: Alphanumeric, 12 positions; display-only. Item description: Alphanumeric, 120 positions; display-only. SKU code: Alphanumeric, three 4-position fields; display-only.
Required qty (Originating item required quantity)	The quantity of the originating item that must be ordered in order to qualify for the accompanying item. The screen displays an error message if you try to create more than one accompanying item for the same required quantity: An accompanying item has already been defined for this quantity. If you define multiple accompanying items for the originating item, the system adds the accompanying item whose Required qty is closest to, but not greater than, the order quantity of the originating item on the order. If you decrease the order quantity of the originating item on the order so that it no longer meets the Required quantity for the accompanying item, the system deletes the accompanying item from the order. See Updating the Originating Item in Order Entry for more information on when the system updates the accompanying item based on updates made to the originating item in order entry. Numeric, 5 positions; required.
Item	The accompanying item to add to the order if the customer orders the required quantity of the originating item. Validated against the Item table. Alphanumeric, 12 positions; required.
SKU	The SKU elements that are used to further define the accompanying item. Validated against the SKU Element (1, 2, 3) tables. Alphanumeric, three 4-position fields; required (if SKU item).

Field	Description
Acc qty (Accompanying item quantity)	The quantity of the accompanying item to add to the order. You must complete this field if the Use Order Quantity field is <i>No</i> . Leave this field blank if you select the Use order quantity field.

 Note:

If you define an Accompanying item quantity and also select the Use order quantity field, the system ignores the quantity defined in the Accompanying item quantity field and instead adds the accompanying item to the order using the same order quantity as the originating item.

Updating the Originating Item in Order Entry

If you change the order quantity of the originating item in order entry and you define an Accompanying item quantity instead of selecting the Use order quantity field, the system does not update the order quantity of the accompanying item when you change the order quantity of the originating item in order entry.

See [Updating the Originating Item in Order Entry](#) for more information on when the system updates the accompanying item based on updates made to the originating item in order entry.

Numeric, 5 positions; required if Use Order Qty is *No*.

Use order qty (Use originating item order quantity)

Defines whether the system adds the accompanying item to the order using the same order quantity as the originating item.

Valid values:

Yes = Add the accompanying item to the order in the same quantity as the originating item.

No = Add the accompanying item to the order using the quantity defined in the [Acc qty \(Accompanying item quantity\)](#) field.

Updating the Originating Item in Order Entry

When you change the order quantity of the originating item on the order, the system looks at the setting of the Use Order Quantity field for the accompanying item to determine if the order quantity of the accompanying item should also change.

1. If the Use Order Quantity field for the accompanying item is set to *No*, the system does not update the order quantity for the accompanying item when the order quantity for the originating item increases.
2. If the Use Order Quantity field for the accompanying item is set to *Yes*, the system updates the order quantity for the accompanying item to match the quantity of the originating item.

See [Updating the Originating Item in Order Entry](#) for more information on when the system updates the accompanying item based on updates made to the originating item in order entry.

Field	Description
Free?	Defines whether the system adds the accompanying item to the order free of charge. Valid values: <i>Yes</i> = The accompanying item is being offered free of charge. <i>No</i> = The accompanying item is not free of charge. The system uses the price assigned in item/offer or SKU/offer.

Maintaining Purchase Orders

Topics in this part:

- [Maintaining Purchase Orders \(MPOE\)](#) tells you how to select a purchase order for maintenance, enter any changes, and accept your entries.

Using Purchase Order Inquiry

Topics in this part:

- [Purchase Order Inquiry \(MPOI\)](#) describes the screens you use to review a purchase order on the system.

Printing Purchase Orders

Topic in this part:

- [Printing Purchase Orders \(MPRP\)](#) describes how to make standard print selections (sequence, date, type) and making additional print selections (vendor, buyers, and warehouses) in order to print or email the purchase order.

Performing Inventory Analyses

Topics in this part:

- [Using Inventory Inquiry \(DINI\)](#) describes how to use the Inventory Quantity Inquiry menu option to review inventory information for items and SKUs.
- [Printing Item Sales Analysis Reports \(MISA\)](#) includes how to access this function, how to set up the report, and a sample report.
- [Printing Item Stock Status Reports \(MISS\)](#) includes how to access this function, how to set up the report, and a sample report.
- [Inventory Inquiry by Item \(IIQI\)](#) describes how to review order activity on screen for a group of SKUs sharing the same first SKU element.
- [Item Availability API](#) describes how the system responds to requests for item availability about an item or group of items.

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

Retail Integration (External System to Order Administration)

Topic in this part: The following topics describe the processes, setup requirements, and functions available to upload item information from your retail system into Order Administration.

- [Retail Integration \(External System into Order Administration\) Overview and Setup](#) explains how you can keep merchandise information at your retail merchandising system in sync with merchandise information in Order Administration.
- [Working with Retail Integration Item Upload \(RIIU\)](#) explains how to upload item information from your retail merchandising system into Order Administration.
- [Creating and Maintaining Long SKU Divisions \(WLDV\)](#) explains how to create and modify long SKU division codes.

Retail Integration (External System into Order Administration) Overview and Setup

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

In this topic:

- [Uses for the Generic Retail Integration from an External System into Order Administration](#)
- [Item Upload Overview](#)
 - [Item Upload Batch Processing](#)
- [Setup for Generic Retail Integration from External System into Order Administration](#)
 - [Populating the RI Item Upload Table \(RIIUPP\)](#)
 - [System Control Values](#)
 - [Secured Feature](#)
 - [Menu Options and Subfile Options](#)
 - [Creating Default and Change Item/SKU Upload Values: **DFLT ITEM and **DFTCHG](#)
- [Creating Default and Change Item/SKU Upload Values: **DFLT ITEM and **DFTCHG](#)
 - [**DFLT ITEM Item/SKU](#)
 - [**DFTCHG Item/SKU](#)
 - [Updating an Existing Item/SKU Value using Both **DFLT ITEM and **DFTCHG](#)

Uses for the Generic Retail Integration from an External System into Order Administration

Using this integration, you can:

- upload new or changed merchandise information located in your retail store to Order Administration, such as:

- item and SKU
- item offer
- SKU offer
- item price
- SKU price
- vendor item
- item UPC
- item and SKU coordinate
- create a hierarchy between a long SKU division, long SKU department, and retail class in Order Administration.

Item Upload Overview

You can use the [RI Item Upload Process](#) to create and maintain item and SKU information in Order Administration that corresponds to your retail store merchandise. You can upload items and SKUs, item/SKU offers, item/SKU prices, item/SKU UPC codes, vendor items, and coordinate items, and optionally create many other supporting values using [Item Upload Batch Processing](#).

The [Use Retail Integration \(H26\)](#) system control value determines whether Order Administration changes certain table structures so that it can read records you upload from your retail system. When this system control value is *selected*, the system:

- uses long SKU class codes from the Retail Class table instead of long SKU class codes from the Long SKU Class table. This allows you to create a hierarchy of retail class within long SKU department. You can link retail classes to a long SKU department in [Working with Long SKU Departments \(WLS D\)](#).
- requires a value in the Long SKU department, Long SKU class (retail class), Long SKU style, and Long SKU subclass fields when you create or maintain a base item.

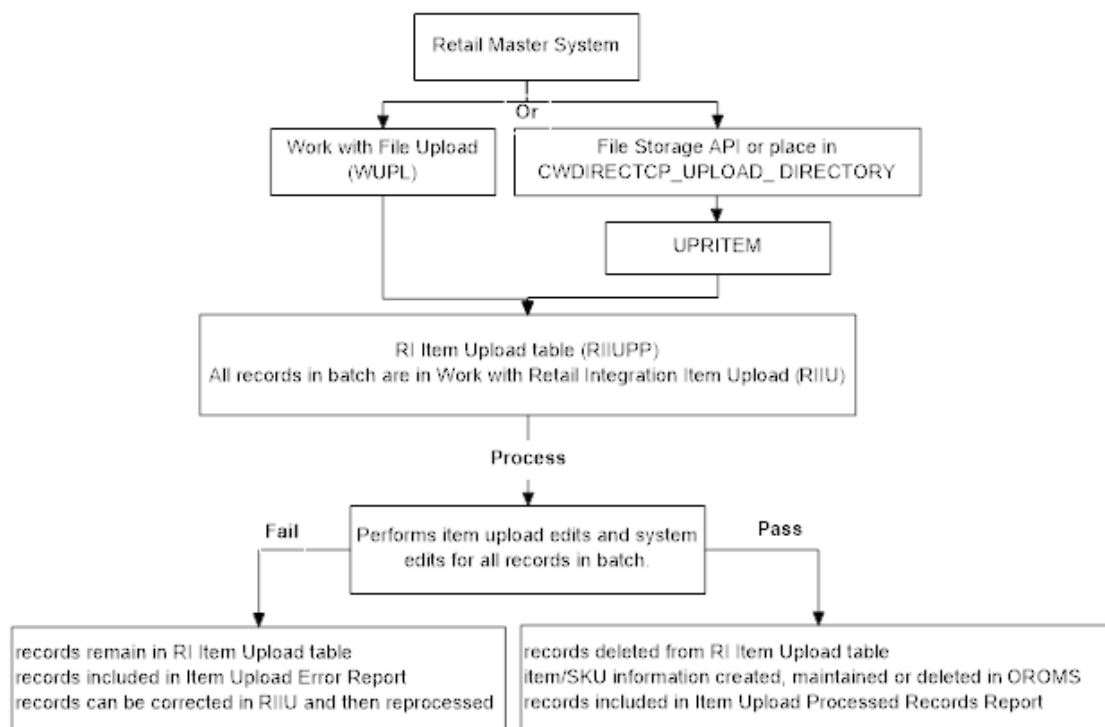
If you wish to selectively require certain long SKU values, you can select one or more of the following system control values instead of selecting the [Use Retail Integration \(H26\)](#) system control value:

- [Require L/S Department \(I92\)](#)
- [Require L/S Class \(I93\)](#)
- [Require L/S Style \(I94\)](#) (This system control value also validates that the long SKU style code is unique at both the item and SKU level.)

Create supporting tables? Order Administration creates supporting table values, such as buyer code, for items/SKUs created or updated through the item upload if they do not already exist in the Order Administration table. See [Tables Updated by the RI Item Upload](#).

Item Upload Batch Processing

Batch processing overview: This flowchart summarizes the process of passing batch item upload records from a retail system other than RMFCS to Order Administration.



How do you upload retail merchandise information? Use the [File Storage API](#) or [Work with File Uploads \(WUPL\)](#) to upload retail merchandise information into the [RI Item Upload Table \(RIIUPP\)](#).

- If you use the [File Storage API](#) to upload the generic Retail Integration Item file named `RIIUPP` into the `FILE_STORAGE` table in the database, you need to use the [UPRITEM Upload Retail Item File](#) (Program name `PFR0134`, Parameter `RIIUPP`) periodic function to create records in the RI Item Upload Table (RIIUPP).
- If you use [Work with File Uploads \(WUPL\)](#), the RI Item Upload Table records are created through the upload process.

How do you process records in the RI Item Upload table? Once you have passed item upload records from your retail master system to the RI Item Upload table, you can view all the records in the batch using the [Working with Retail Integration Item Upload \(RIIU\)](#) menu option. In order to process the records in the RI Item Upload table:

- Select *Process* at the [Work with Retail Item Upload Screen](#).
- Select *Accept* at the [Copy Item to Company Window](#) in [Working with Existing Items \(MITM\)](#).
- Submit the `RIUPLD` function using the `PFR0084` program. See [Scheduling Jobs](#) for background.

Records that pass all edits: The system deletes these records from the RI Item Upload table and the requested update (create or maintain) is made in Order Administration.

Records that fail one or more of the edits: The system retains these records in the RI Item Upload table and also creates a record for each RI Item Upload record in error in the RI Item Upload Error table. You can review and correct the errors, or delete the record(s) using [Working with Retail Integration Item Upload \(RIIU\)](#). You can review item upload records in error on the:

- [Item Upload Error Report](#): lists item upload records that are in error.

- [Record Deleted from RI Item Upload Report](#): lists item upload records that you manually deleted at the [Work with Retail Item Upload Screen](#).

Retail Item Upload email: If a valid email is defined in the Email address field for the user that submitted the RI Item Upload Program, the system sends a [Retail Item Upload Email](#) to the user's email address when the job completes indicating whether all records were processed successfully or whether any records contain errors.

For more information: See [Working with Retail Integration Item Upload \(RIIU\)](#).

Setup for Generic Retail Integration from External System into Order Administration

Before you can use the generic retail integration from an external system (other than RMFCS) into Order Administration, you must perform the necessary setup. Information requiring creation and setup includes:

- [Populating the RI Item Upload Table \(RIIUPP\)](#)
- [System Control Values](#)
- [Secured Feature](#)
- [Menu Options and Subfile Options](#)
- [Creating Default and Change Item/SKU Upload Values: **DFLT ITEM and **DFTCHG](#)
 - [**DFLT ITEM Item/SKU](#)
 - [**DFTCHG Item/SKU](#)
 - [Updating an Existing Item/SKU Value using Both **DFLT ITEM and **DFTCHG](#)

Populating the RI Item Upload Table (RIIUPP)

Create an RI Item Upload text file that contains the records to upload.

To upload the text file:

- If you use the [File Storage API](#) to upload the Retail Integration Item file named `RIIUPP` or `RIIUP.txt` (the txt extension is not case-sensitive) into the `FILE_STORAGE` table in the database, you need to use the *UPRITEM Upload Retail Item File* (Program name `PFR0134`, Parameter `RIIUPP`) periodic function to create records in the RI Item Upload Table (RIIUPP).
- If you use [Work with File Uploads \(WUPL\)](#) to upload the text file named `RIIUPP`, the RI Item Upload Table records are created through the upload process.

See [Sample Retail Integration Items Upload Data](#) for information on the contents of the text file.



Note:

When populating the RI Item Upload table, the information should be entered in all upper case.

System Control Values

This table contains the system control values you should set up to use generic retail integration from an external system into Order Administration.

System Control Value	Description
Use Retail Integration (H26)	Select this field if you wish the system to: • use long SKU class codes from the Retail Class table instead of long SKU class codes from the Long SKU Class table. This allows you to create a hierarchy of retail class within long SKU department. You can link retail classes to a long SKU department in Working with Long SKU Departments (WLS D). • require a value in the Long SKU department, Long SKU class (retail class), Long SKU style, and Long SKU subclass fields when you create or maintain a base item. Leave this field blank if you do not wish to link a long SKU class (retail class) to a long SKU department. In addition, leave this field blank if you wish to selectively indicate which long SKU values are required.
Require L/S Department (I92)	Select this field if you want to require a value in the Long SKU department when you create or maintain a base item.

 Note:

The system ignores the setting of this system control value if the [Use Retail Integration \(H26\)](#) system control value is selected.

[Require L/S Class \(I93\)](#)

Select this field if you want to require a value in the Long SKU class when you create or maintain a base item.

 Note:

The system ignores the setting of this system control value if the [Use Retail Integration \(H26\)](#) system control value is selected.

System Control Value	Description
Require L/S Style (I94)	Select this field if you want to require a value in the Long SKU style when you create or maintain a SKU. The system also validates that the long SKU style at the item level and SKU level is a unique value.

 Note:

The system ignores the setting of this system control value if the *Use Retail Integration (H26)* system control value is selected.

[Auto-Generate Item Keywords from Description \(F79\)](#)

Select this field if you want the system to automatically create keywords for items created through the RI Item Upload process for record type 01 Item/SKU.

 Note:

The system creates new keywords for the item based on its current description; however, any existing keywords for the item will remain.

Secured Feature

The [Maintain Long SKU Values in MITM \(B05\)](#) secured feature determines whether a user has authority to change long SKU values in Work with Item/SKUs.

Menu Options and Subfile Options

This table contains the menu options and subfile options you use for retail integration from external system into Order Administration.

Menu Option	Purpose
Working with Retail Integration Item Upload (RIIU)	Use this menu option to process, review and correct batch item upload records passed to Order Administration from your retail master system.

Menu Option	Purpose
Performing Initial Item Entry (MITM)	Enter values in these fields when you create or modify an item and you are using retail integration from an external system into Order Administration: - Long SKU department - Long SKU class - Long SKU style - Long SKU subclass optionally (also, optional overrides for SKUs): - Retail style number - Original retail price - Long SKU color - Long SKU size - Long SKU width - Long SKU vendor - UPC code Creating default item/SKU values You can create the **DFLT ITEM Item/SKU to update blank fields in the item upload records with the values from the corresponding fields in the **DFLT ITEM. See **DFLT ITEM Item/SKU for setup instructions. Changing item/SKU values You can create the **DFTCHG Item/SKU to determine when the system updates the fields for an existing item/SKU with the values defined for a change item upload record. - If a value has been defined for a field in the **DFTCHG item, the system does not update the value defined for the existing item with the value from the change item upload record. - If a value has not been defined for a field in the **DFTCHG item, the system updates the value defined for the existing item with the value from the change item upload record. See **DFTCHG Item/SKU for setup instructions.
Working with Periodic Functions (WPER)	You can schedule the periodic functions, including the UPRITEM Upload Retail Item File (Program name PFR0134,ParameterRIIUPP), the RI Item Upload Translation Program, and RI Item Upload Edit Program to run the Item Upload Process periodically. See Scheduling Jobs for background.

Creating Default and Change Item/SKU Upload Values: ****DFLT ITEM** and ****DFTCHG**

You can create the following items in Order Administration for the system to consider when uploading RI item upload records for record type *01* (item/SKU information).

- **DFLT ITEM**: create this item in Order Administration to define the values to *default* to add or change item upload records; see ****DFLT ITEM Item/SKU**.
- **DFTCHG**: create this item in Order Administration to determine *when* the system updates an existing item/SKU with the values defined in a change item upload record; see ****DFTCHG Item/SKU**.



Note:

You are not required to create the ****DFLT ITEM** item or ****DFTCHG** item, however it is recommended.

**DFLT ITEM Item/SKU

You can create an item in Order Administration to define the values to default to add or change item upload records. This is helpful if there are certain values that are always the same for each item; instead of entering the value for each item upload record, you can have the value default. For example, if the buyer code for each item is always BTM, you can enter BTM as a default value to default to each of your item upload records.

The system defaults a value to the item upload record only if the current value for the item upload record is blank; if the field in the item upload record is not blank, the system does not default a value.

Example: If you enter A01 in the Location field for **DFLT ITEM, the system defaults location A01 when you upload an add or change item upload record and the Location field for the item upload record is blank. If the Location field for the item upload record is *not* blank, the system does not use the value in **DFLT ITEM.



Note:

The system defaults values to add or change item upload records only for record type 01 (item/SKU information). You cannot default values for any other record type, such as item/offer or vendor item.

Many fields are unique to an item/SKU; nevertheless, when you pass item upload records, every blank field in the item upload record defaults a value from the **DFLT ITEM (if you've defined one) except these fields:

- Allow SKUs
- Item Description
- SKU Description

Instructions: Use the following steps to create the **DFLT ITEM item and SKU.

1. Create the SKU element NA for SKU Element 1 in the Work with SKU Element 1 (WSK1) menu option. **Important:** You need to create the SKU element NA if you wish to default information at the SKU level.
2. Create the item **DFLT ITEM in the Work with Items/SKUs (MITM) menu option. See [Performing Initial Item Entry \(MITM\)](#). When creating this item:
 - Select the [SKUs \(Stock keeping unit\)](#) field to indicate the item contains SKUs.
 - Populate the fields that you want to establish as company-wide item default values for any blank fields that you pass for an 01 item/SKU record type. **Note:** If you define a default SKU group, the system uses this value for SKUed items only since this field does not apply to non-SKUed items.
 - Advance to the [Create SKU 1 of 2 \(With Overrides\) Screen](#) and enter NA in the first SKU element field.
 - Populate the fields that you want to set up as SKU default values for any blank fields that you pass for an 01 item/SKU record type.
 - When you are finished entering the SKU default values, select OK to start using these item and SKU default values for item uploads.

When does the system use the **DFLT ITEM value? This table explains when the system updates the value defined for the existing item/SKU, based on the value defined for the existing item, **DFLT ITEM, and item upload record.

**Note:**

This table assumes the [Retail Integration \(External System into Order Administration\) Overview and Setup](#) does not exist; see *Updating an Existing Item/SKU Value using Both **DFLT ITEM and **DFTCHG* to review a table that explains how the system updates the value defined for an existing item/SKU, based on the value defined for the existing item, **DFLT ITEM, **DFTCHG, and the upload record.

Results based on the setting of the Buyer field are indicated below.

Existing item/SKU	**DFLT ITEM	Upload record	Results
new item	blank	blank	The system updates the Buyer field for the new item/SKU to blank.
new item	AAA	blank	The system updates the Buyer field for the new item/SKU to AAA.
new item	blank	AAA	The system updates the Buyer field for the new item/SKU to AAA.
new item	AAA	BBB	The system updates the Buyer field for the new item/SKU to BBB.
AAA	blank	blank	The system updates the Buyer field for the existing item/SKU to blank.
blank	AAA	blank	The system updates the Buyer field for the existing item/SKU to AAA.
blank	blank	AAA	The system updates the Buyer field for the existing item/SKU to AAA.
AAA	BBB	blank	The system updates the Buyer field for the existing item/SKU to BBB.
AAA	blank	BBB	The system updates the Buyer field for the existing item/SKU to BBB.
blank	AAA	BBB	The system updates the Buyer field for the existing item/SKU to BBB.
AAA	BBB	CCC	The system updates the Buyer field for the existing item/SKU to CCC.

****DFTCHG Item/SKU**

You can create an item in Order Administration to determine when the system updates an existing item/SKU with the values defined in a change item upload record. This is helpful if you only want to enter values in the change item upload record for the fields you wish to change, not the fields you wish to keep the same. For example, if you wish to only change the buyer code for an existing item, you can upload an item upload record with a value in the Buyer field and all other optional fields blank; if a value is defined for the **DFTCHG item, the system knows that you do not want to update the other fields for the existing item/SKU to blank, but rather, keep the existing values. However, if the **DFTCHG item does not exist or a value is not defined for the **DFTCHG item, the system updates the other fields for the existing item/SKU to blank.

Example: If you enter A01 in the Location field for **DFTCHG, the system does not update the Location field for an existing item/SKU when you upload a change item upload record; if you do not enter a value in the Location field for **DFTCHG, the system updates the Location field for an existing item/SKU when you upload a change item upload record.



Note:

The system uses the ****DFTCHG** item only for record type **01** (item/SKU information) upload records in change mode. The system does not use ****DFTCHG** for any other record type, such as item/offer or vendor item, and does not use ****DFTCHG** for add mode or delete mode.

Instructions: Use the following steps to create the ****DFTCHG** item and SKU.

1. Create the SKU element ***DFT** for SKU Element 1 in the Work with SKU Element 1 (WSK1) menu option. **Important:** You need to create the SKU element ***DFT** if you wish to determine change information at the SKU level.
2. Create the item ****DFTCHG** in the Work with Items/SKUs (MITM) menu option. See [Performing Initial Item Entry \(MITM\)](#). When creating this item:
 - Select the [SKUs \(Stock keeping unit\)](#) field to indicate the item contains SKUs
 - Populate the fields that you want to establish as company-wide item values that you do not wish to change for existing item/SKUs when you upload a change item/SKU upload record. **Note:** The values you enter in the fields are meaningless; the value only indicates that you do not wish this field to update for an existing item.
 - Advance to the [Create SKU 1 of 2 \(With Overrides\) Screen](#) and enter ***DFT** in the first SKU element field.
 - Populate the fields that you want to set up as SKU values that you do not wish to change for existing item/SKUs. **Note:** The values you enter in the fields are meaningless; the value only indicates that you do not wish this field to update for an existing SKU.
 - When you are finished entering the SKU default values, select **OK** to start using these item and SKU values for item uploads.

Required fields: Certain fields are required when you create the ****DFTCHG** item and ***DFT** SKU (for example, the Warehouse field). In order to update these fields based on information passed for a record in the RI Item Upload table for record type **01** (item/SKU information) in change mode, you must manually update these fields to blank in the Order Administration database. **Note:** If you manually clear a required field for the ****DFTCHG** item or ***DFT** SKU in the database, you can no longer change the item and SKU using the Work with Items/SKUs (MITM) menu option. If you try to change the item or SKU in Work with Items/SKUs (MITM), the system will require an entry in each required field.

Check box fields: Certain fields defined for an item (such as the Drop ship flag) and defined for a SKU (such as the Suppress backorder card flag) display as check boxes in the Work with Items/SKUs (MITM) menu option.

- If you *select* a check box field, the system updates the record in the database to **Y** and considers the field populated with a value.
- If you leave a checkbox field *unselected*, the system updates the record in the database to **N** and also considers the field populated with a value.

Because a check box field is always populated in the database with a **Y** or **N**, the system will never update this field based on information passed in the RI Item Upload table for record type **01** (item/SKU information) upload records in change mode. In order for the system to consider the field unpopulated (blank), and allow you to update the field based on information passed in the RI Item Upload table, you must manually update the check box fields for the ****DFTCHG** item in the Item table and manually update the check box fields for the ***DFT** SKU in the SKU table so that the field does not contain a **Y** or an **N**.



Note:

If you manually update the check box fields for the ****DFTCHG** item and ***DFT SKU** in the database, you can no longer change the item and SKU using the Work with Items/SKUs (MITM) menu option. If you try to change the item or SKU in Work with Items/SKUs (MITM), the system will update the check box fields that you set to blank in the database to *N* (unselected).

When does the system use the **DFTCHG** value?** This table explains when the system updates the value defined for the existing item/SKU, based on the buyer field value defined for the existing item, ****DFTCHG**, and item upload record.



Note:

This table assumes the ****DFLT ITEM** Item/SKU does not exist; see *Updating an Existing Item/SKU Value using Both ****DFLT ITEM** and ****DFTCHG*** to review a table that explains how the system updates the value defined for an existing item/SKU, based on the value defined for the existing item, ****DFLT ITEM**, ****DFTCHG**, and the upload record.

Existing item/SKU	**DFTCHG	Upload record	Results
AAA	blank	blank	The system updates the Buyer field for the existing item/SKU to blank.
blank	AAA	blank	The system does not update the Buyer field for the existing item/SKU; the field remains blank.
blank	blank	AAA	The system updates the Buyer field for the existing item/SKU to AAA.
AAA	BBB	blank	The system does not update the Buyer field for the existing item/SKU; the field remains AAA.
AAA	blank	BBB	The system updates the Buyer field for the existing item/SKU to BBB.
blank	AAA	BBB	The system does not update the Buyer field for the existing item/SKU; the field remains blank.
AAA	BBB	CCC	The system does not update the Buyer field for the existing item/SKU; the field remains AAA.

Updating an Existing Item/SKU Value using Both **DFLT ITEM** and ****DFTCHG****

If you have both the ****DFLT ITEM** Item/SKU and ****DFTCHG** Item/SKU set up, the system uses the following hierarchy when uploading a change item upload record:

- Is the field in the item upload record blank? If yes, the system defaults the value defined in the ****DFLT ITEM** Item/SKU.
- Does a value exist for the field in the ****DFTCHG** Item/SKU?
 - If yes, the system should not update the exiting item/SKU with the uploaded value, regardless if the value defaulted from ****DFLT ITEM**.
 - If no, the system should update the existing item/SKU with the uploaded value, regardless if the uploaded value is blank or defaulted from ****DFLT ITEM**.

This table explains when the system updates the value defined for the existing item/SKU, based on the value defined for the existing item, **DFLT ITEM, **DFTCHG, and item upload record, based on the Buyer field value.

Existing item/SKU	**DFLT ITEM	**DFTCHG	Upload record	Results
AAA	blank	blank	blank	The system updates the Buyer field for the existing item/SKU to blank.
blank	AAA	blank	blank	The system updates the Buyer field for the existing item/SKU to AAA.
blank	blank	AAA	blank	The system does not update the Buyer field for the existing item/SKU; the field remains blank.
blank	blank	blank	AAA	The system updates the Buyer field for the existing item/SKU to AAA.
AAA	BBB	blank	blank	The system updates the Buyer field for the existing item/SKU to <i>BBB</i> .
AAA	blank	BBB	blank	The system does not update the Buyer field for the existing item/SKU; the field remains AAA.
AAA	blank	blank	BBB	The system updates the Buyer field for the existing item/SKU to <i>BBB</i> .
blank	blank	AAA	BBB	The system does not update the Buyer field for the existing item/SKU; the field remains blank.
blank	AAA	BBB	blank	The system does not update the Buyer field for the existing item/SKU; the field remains blank.
blank	AAA	blank	BBB	The system updates the Buyer field for the existing item/SKU to <i>BBB</i> .
AAA	BBB	CCC	blank	The system does not update the Buyer field for the existing item/SKU; the field remains AAA.
AAA	BBB	blank	CCC	The system updates the Buyer field for the existing item/SKU to CCC.
AAA	blank	BBB	CCC	The system does not update the Buyer field for the existing item/SKU; the field remains AAA.
blank	AAA	BBB	CCC	The system does not update the Buyer field for the existing item/SKU; the field remains blank.
AAA	BBB	CCC	DDD	The system does not update the Buyer field for the existing item/SKU; the field remains AAA.

Performing Initial Item Entry (MITM)

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

You can use the Work with Items/SKUs function not only to work with the item and/or SKU, but also supporting information such as item codes, offer and warehouse, and item keywords. See [Working with Existing Items \(MITM\)](#) for an overview.

Copying items: Copying items allows you to:

- Copy item information from one item to a new item in the same company using the [Copy Item Window](#).
- Add, change or delete item information, for an item with the same item number as the copied item, in one or more shared companies using the [Copy Item to Company Window](#).

See *Copying Items* for an overview.

In this topic:

- [Select Items Screen](#)
- [Creating Items Screen Flow](#)
- [Creating Non-SKU'ed Items Screen Flow](#)
- [Creating SKU'ed Items Screen Flow](#)
- [Create Item Screen](#)
- [Create Item \(Base Information\) Screen](#)
- [Create Item Offer Screen](#)
- [Create SKU 1 of 2 \(With Overrides\) Screen](#)
- [Create SKU 2 of 2 \(With Overrides\) Screen](#)
- [Create SKU Offer Screen](#)

Select Items Screen

Purpose: Use this screen to select an item to work with or review. You can also select an item directly by entering a valid item code in the Item field.

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

Field	Description
Item	Your item code. Enter a valid item code to advance to the Change Item screen for that item. If you enter a partial item code, you advance to the Work with Items Screen . Alphanumeric, 12 positions; optional.
Clr Size Wdth	The SKU elements. You can enter any portion of the item's elements along with the item code. If you enter just a SKU element (e.g., blue), the system displays every item in the table, not just blue items. Alphanumeric, three 4-position fields; optional.

Field	Description
Description	The description of the item.
	 Note: You can search for an item based on a partial description, even if the item description exceeds the length of the field displayed on the screen, and your search entry is toward the end of the description. For example, if the item description is CHICKEN RECIPE WEIGHT MANAGEMENT DRY FOOD FOR ADULT AND SENIOR INDOOR CATS, you can still search by entering CATS, even if that word is not displayed.
Department	Alphanumeric, 120 positions; optional. The long SKU Department to which the item belongs. Numeric, 4 positions; optional.
Buyer	A Buyer is a person who is authorized to make purchases for your company. Alphanumeric, 3 positions; optional.
Class	An item Item Class code is a grouping of similar items. Alphanumeric, 3 positions; optional.
Vendor (Vendor number)	A Vendor defines the supplier of an item. Numeric, 7 positions; optional.
Reference #	Represents the retail reference or alternate product number. You can use this value to cross-reference an item/SKU to an external system. If you enter a valid reference number for a non-SKU'ed item, you advance to the Change Item screen for that item. If you enter a valid reference number for an item that contains SKUs, you advance to the Change SKU with Overrides screen. If more than one item or SKU is associated with the reference number you entered, you advance to the Select SKU for Reference Number pop-up window, where you can select the item or SKU you wish to work with. The retail reference number is set to the same value as the item code when you create items through Importing Enterprise Foundation Data through Omnichannel Cloud Data Service (OCDS), and the number should not be changed. This number is also used for the Integration with the Sales Audit Module of the Oracle Retail Merchandising Foundation Cloud Service. Numeric, 15 positions; optional.
Screen Option	Procedure
Create an item	Select <i>Create</i> to advance to the Create Item Screen .

Screen Option	Procedure
Advance to a menu option related to item maintenance	Select <i>Supporting Files</i> to advance to the Item Support File Maintenance window. Options at this window are: • <i>Buyer</i>; see Working with Buyers (WBUY) • <i>Vendor</i>; see Working with Vendors (WVEN) • <i>Hazard</i>; see Working with Hazardous Item Codes (WHAZ) • <i>Item Category</i>; see Working with Item Category Codes (WITG) • <i>Item Class</i>; see Working with Item Classes (WICL) • <i>Item SKU Group</i>; see Working with SKU Groups (WISG) • <i>Item Status</i>; see Working with Item Status (WIST) • <i>Location Class</i>; see Creating and Maintaining Location Classes (WLCL) • <i>Long SKU Class</i>; see Working with Long SKU Classes (WLSC) • <i>Long SKU Department</i>; see Working with Long SKU Departments (WLSD) • <i>Ship Via</i>; see Working with Ship Via Codes (WVIA) • <i>Offer</i>; see Working with Offers (WOFR) • <i>Unit Of Measure</i>; see Working with Units of Measure (WUOM) • <i>Keyword</i>; see Working with Item Keywords (WKEY)

Creating Items Screen Flow

Purpose: Select *Create* at the *Select Items Screen* or the [Work with Items Screen](#) to add an item.

The screen flow varies, depending on whether you are creating a non-SKU'ed item or SKU'ed item.

Additionally, the [Item Creation Values \(J08\)](#) umbrella system control value includes values that control the screen flow when you are creating an item.

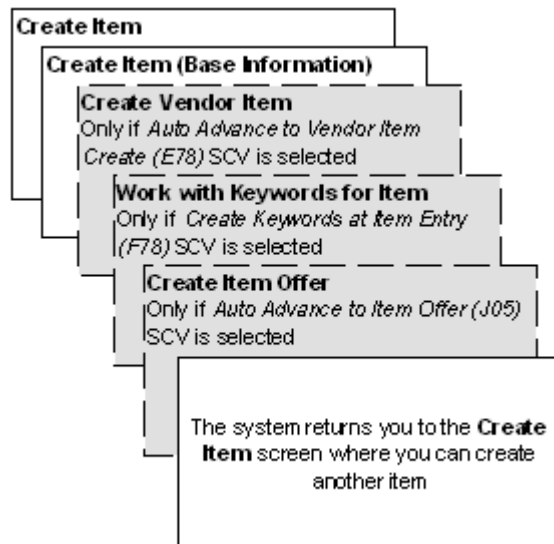
Creating Non-SKU'ed Items Screen Flow

Deselect the SKUs field on the [Create Item Screen](#) to create a non-SKU'ed item. The system automatically advances you through the following screens to create a non-SKU'ed item.

- [Create Item Screen](#)
- [Create Item \(Base Information\) Screen](#)
- [Create Vendor Item Screen](#) (only if the [Auto Advance to Vendor Item Create \(E78\)](#) system control value is *selected*)
- [First Work with Keywords for Item Screen](#) (only if the [Create Keywords at Item Entry \(F78\)](#) system control value is *selected*)
- [Create Item Offer Screen](#) (only if the [Auto Advance to Item Offer \(J05\)](#) system control value is *selected*)

Once you have completed creating the item, the system returns you to the [Create Item Screen](#) where you can create another item.

Non-SKU'ed item screen flow:



Creating SKU'ed Items Screen Flow

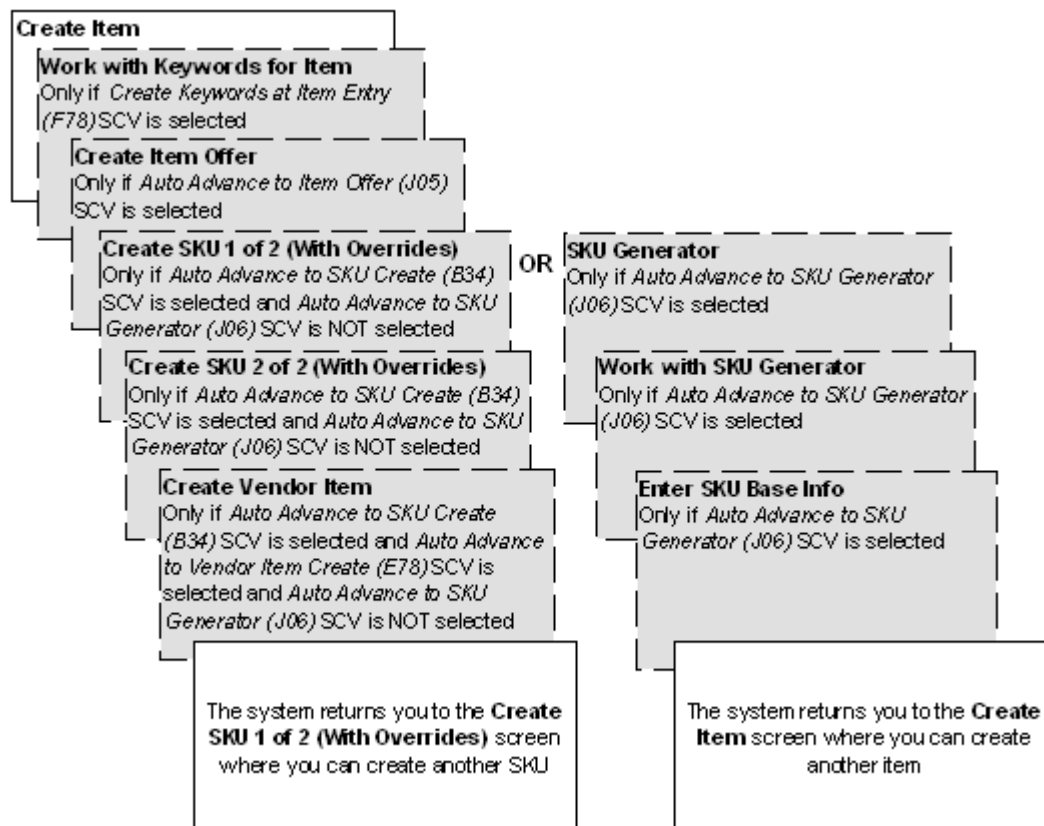
Select the SKUs field on the [Create Item Screen](#) to create a SKU'ed item. The system automatically advances you through the following screens to create a SKU'ed item.

#	Step
1.	Create Item Screen
2.	First Work with Keywords for Item Screen (only if the Create Keywords at Item Entry (F78) system control value is <i>selected</i>)
3.	Create Item Offer Screen (only if the Auto Advance to Item Offer (J05) system control value is <i>selected</i>)
4.	Depending on whether you are using the SKU Generator: Create SKU 1 of 2 (With Overrides) Screen (only if the Auto Advance to SKU Create (B34) system control value is <i>selected</i> and the Auto Advance to SKU Generator (J06) system control value is <i>unselected</i>) SKU Generator Screen (Entering SKU Information) (only if the Auto Advance to SKU Generator (J06) system control value is <i>selected</i>)
6.	Depending on whether you are using the SKU Generator: Create SKU 2 of 2 (With Overrides) Screen (only if the Auto Advance to SKU Create (B34) system control value is <i>selected</i> and the Auto Advance to SKU Generator (J06) system control value is <i>unselected</i>) Work with SKU Generator Screen (only if the V system control value is <i>selected</i>)
7.	Depending on whether you are using the SKU Generator: Create Vendor Item Screen (only if the Auto Advance to SKU Create (B34) system control value is <i>selected</i>, the Auto Advance to Vendor Item Create (E78) system control value is <i>selected</i> and the Auto Advance to SKU Generator (J06) system control value is <i>unselected</i>) Enter SKU Base Information Pop-Up Window (only if the Auto Advance to SKU Generator (J06) system control value is <i>selected</i>)

Once you have completed creating the item and SKU, you return to the:

- [Create SKU 1 of 2 \(With Overrides\) Screen](#) if you are not using the SKU Generator, where you can create another SKU.
- [Create Item Screen](#) if you are using the SKU Generator, where you can create another item.

SKU'ed item screen flow:



Create Item Screen

How to display this screen: Select *Create* at the *Select Items Screen* or the [Work with Items Screen](#).

Field	Description
Item	A user-defined code that represents a unit of inventory. The system assigns an item number if the Auto assign item # system control value is <i>selected</i> ; however, you can override this value. Alphanumeric, 12 positions; required.
Description	A user-defined description of the item. • Not all screens or reports will display the full description if it exceeds the available space for this field. • Not all extracts and imports will support a description that exceeds 40 positions. Alphanumeric, 120 positions; required.
Second language description	Not currently implemented. Alphanumeric, 40 positions; optional.

Field	Description
SKUs (Stock keeping unit)	Indicates whether the item is available in various styles, such as color, size, etc. Valid values are: <i>selected</i> = This item has SKUs associated with it. <i>unselected</i> = There are no SKUs associated with this item. See Creating Items Screen Flow for information on how this setting controls screen flow when you are creating an item.
SKU group (Stock keeping unit group)	A code that represents a group of common characteristics of a SKU item. You can use SKU groups to facilitate data entry when you use the SKU Generator; see Using the SKU Generator (ESKG). The following are examples of SKU groups: - SKU Group 001 lists the colors in which an umbrella is available (such as Pink, Mint, Ltbl, Yelw, Ivry, Lvnd). - SKU Group 002 lists the sizes in which sheets are available (such as King, Qn, Full, and Twn). If you assign a SKU group to an item, it defaults when you use the SKU generator and is display-only. You can also specify a SKU group when you are using the SKU generator. SKU Group codes are defined in the SKU Group table; see Working with SKU Groups (WISG). Numeric, 3 positions; optional.
Deflt cost (Default cost)	The standard cost of the item. Unlike the Cost field on the second Create/Change/Display Item or SKU (with Overrides) screens, this field is not updated by the system through landed cost updating.
 Note: The Display Cost in Inventory (A38) secured feature controls the display of this field at the Change Item screen and Display Item screen.	
Vendor	Numeric, 13 positions with a 4-place decimal; optional. A user-defined code that represents the vendor or supplier of an item. Validated against the Vendor table. Used to: - Generate vendor items. The system uses this information as the default when you use the SKU Generator; however, you can override it. - Generate drop ship pick slips or purchase orders. - Sort and print on various reports. Vendor codes are defined in and validated against the Vendor table; see Working with Vendors (WVEN). Numeric, 7 positions; optional.

Field	Description
Buyer	A user-defined code that represents a person who is authorized to make purchases for your company. Used primarily for reporting purposes, and does not default on purchase orders. Buyer codes are defined in and validated against the Buyer table; see Working with Buyers (WBUY). Alphanumeric, 3 positions; optional.
Drop ship	Indicates whether you ship the item from your warehouse, or have your vendor ship it to the customer directly. Valid values are: <i>selected</i> = When a customer orders the item, you order the item from your vendor and the vendor ships it directly to your customer. <i>unselected</i> (default) = You ship the item from your warehouse. If you select this flag and try to create a set item (<i>Kit type</i> of S), an error message indicates: Item drop ship and kit type fields are mutually exclusive. Kit type can not be equal to "S" for a drop ship item. Drop ship items are not eligible for zone reservation. If you select this flag and try to assign a Zone reservation code to an item, an error message indicates: SKU not eligible for zone reservation code. You identify a drop ship item at the item level, even if the item is SKU'ed.
 Note: For drop ship items, the system tries to reserve the total amount of the customer order from inventory; however, if it can't reserve the entire amount, it generates drop ship pick slips or POs when you run drop ship processing. See Processing Drop Ship Orders by Batch (MDSB).	
Mfg vendor (Manufacturing vendor)	The vendor who manufactured the item. Used primarily for informational and query purposes. Numeric, 7 positions; optional.
Exclude FPO (Exclude flexible payment option)	Determines whether this item is excluded from deferred and installment payment plans. Valid values are: <i>selected</i> = Exclude this item from deferred and installment payment plans. Any order containing an excluded item cannot have a pay plan applied to it; instead, an error message indicates: Order is not eligible for deferred/installment billing plan. <i>unselected</i> = Do not exclude this item from deferred and installment payment plans. See Deferred/Installment Billing Overview.

Field	Description
Membership	Indicates that the item represents a membership program, which you can use to generate periodic orders to a customer. Valid values are: <i>selected</i> = This is a membership item <i>unselected</i> = This is not a membership item When you add a membership item in order entry, the system displays a pop-up window for you to select the membership program in which to enroll the customer. <i>Simplify creating a membership:</i> You can use the same code for the item number and the membership ID. When you enter this item code in order entry, it defaults to the membership program field in the pop-up window.



Note:

If you process orders through the web storefront, the membership item and program ID *must* be the same.

If the membership includes a discount: You should deselect the Discountable field for the membership item, or the price of the membership itself will be discounted.

You should *select* the Non/inv flag for a membership item.

L/S dept (Long SKU department)

A code used to group items into departments for reporting purposes. Long SKU departments are defined in and validated against the Long SKU Department table; see [Working with Long SKU Departments \(WLS D\)](#).

Required if the [Use Retail Integration \(H26\)](#) system control value or [Require L/S Department \(I92\)](#) system control value is selected.

When you upload items into Order Administration, you can identify the item using a combination of long SKU department, long SKU class, long SKU style, long SKU vendor, long SKU color, long SKU size, and long SKU width; see [Retail Integration \(External System into Order Administration\) Overview and Setup](#).

Secured Feature: If you do not have authority under the [Maintain Long SKU Values in MITM \(B05\)](#) secured feature, you can not enter or change this value.

Numeric, 4 positions; required if system control value is selected.

Field	Description
L/S class (Long SKU class)	A code you can use to group items into classes for reporting purposes. Long SKU classes are defined in and validated against the Long SKU Class table; see Working with Long SKU Classes (WLSC). Required if the <i>Use Retail Integration (H26)</i> system control value or <i>Require L/S Class (I93)</i> system control value is selected. Retail Integration (external system to Order Administration) If the <i>Use Retail Integration (H26)</i> system control value is selected, long SKU classes are linked to long SKU departments and are called retail classes. Retail classes are department specific whereas regular long SKU classes are unique and remain constant across departments. For this reason, when the <i>Use Retail Integration (H26)</i> system control value is selected, you can only enter a retail class that is assigned to the long SKU department in this field. If you enter a long SKU class that is not linked to the long SKU department, the system does not let you proceed and displays an error message: L/S Class (xxxx) was not found in L/S Department (xx). Since retail classes are department specific, if you prompt in this field before entering a long SKU department, an error message indicates: L/S Department required to prompt on L/S Class. Retail classes are defined in and validated against the Retail Class table; see the Work with Retail Class Screen.



Note:

When the *Use Retail Integration (H26)* system control value is selected, the system populates and validates against the Retail Class table instead of the Long SKU Class table; therefore, you cannot access [Working with Long SKU Classes \(WLSC\)](#).

Secured Feature

If you do not have authority under the *Maintain Long SKU Values in MITM (B05)* secured feature, you cannot enter or change this value.

Numeric, 4 positions; required if system control value is selected.

Class

A user-defined code that identifies a group of items. Item class codes are used to

- sort inventory,
- define information templates at the item class level,
- assign city/state restrictions, and
- assign customer class restrictions.

Validated against the Item Class table; see [Working with Item Classes \(WICL\)](#).

An item class is required if the *Require Item Class in Work with Items (F06)* system control value is selected. An error message indicates that you left this field blank:

Item class required.

Alphanumeric, 3 positions; required if the *Require Item Class in Work with Items* system control value is selected.

Field	Description
Unit/measure	A standard by which an item is sold. Typical units of measure include: • <i>EA</i> = each • <i>IN</i> = inches • <i>C12</i> = case of 12 Validated against the Unit of Measure table (see Working with Units of Measure (WUOM)) and defaults from the Default Item Unit of Measure (B33) system control value, if a value is specified. Alphanumeric, 3 positions; required.
Kit type	Defines the type of kit or set functionality represented by this item. Valid values: • <i>Set</i> = A predefined group of items that is grouped together when it is picked and packed. A set may be comprised of items that are sold individually or only as part of the set. An item record must exist for each component item of the set. • <i>Finished good</i> = Items that are assembled and stocked as a finished unit. These items may be comprised of items that are sold individually or of raw materials that are used only as components of a finished good. An item record must exist for each component item, so that you may track inventory and usage. • <i>Variable set</i> = Customers can choose from a list of items to make up a variable set. For example, an offer says to choose any 2 slacks, 1 jacket, and 1 belt from this page for only \$200.00. The Order Entry operator sees a screen listing the available items. You must define the pool of items. Typically, you present the items available in a variable set on the same page of the catalog. • <i>Blank</i> = none of the above. Kit items are not eligible for zone reservation. If you enter a value here and try to assign a Zone reservation code to an item, the system displays an error message: SKU not eligible for zone reservation code. See Working with Sets. Optional.
Status	A code that represents an item's status, such as obsolete, discontinued, etc. This information is used for inventory reporting purposes; also, items that are assigned the Item Status for Suppressing Item During Item Selection (L21) at the item level are not listed at the Item Selection screen. See Working with Item Status (WIST) for background. Alphanumeric, 1 position; optional.
Ship wgt. (Shipping weight)	The actual shipping weight of the item. The system can use this value to calculate carton weights and determine shipping charges if you: • perform manual confirmation • use cubing • specify an alternate shipper based on minimum shipping weight Also, the system uses the shipping weight defined for the item to create item weight records in the Download Extended Manifest table (FLMNDE) when you use a PC Manifest to confirm shipments. Numeric, 7 positions with a 3-place decimal; optional.
Sell wgt. (Selling weight)	Used to calculate the freight charge on an item when the Freight method on the order is set to <i>By Item</i> or <i>Flat Rt/Item</i>. Numeric, 7 positions with a 3-place decimal; optional.

Field	Description
Ship alone	Indicates how to ship this item. Valid values are: • <i>Ship Alone</i> = This item must ship by itself, and each unit prints on its own pick. • <i>Blank</i> = This item can be shipped with other items. • <i>User Defined</i> = A user-defined code for any special shipping requirements. Optional.
Height	The height measurement for an item. The Height, Length, and Width values determine the cubic volume of an item. Can be entered in feet or centimeters, or any other measurement as long as it is consistent. Used in Suggest Location Placement (MSLO) when evaluating whether an item can be stored in a particular location. Numeric, 3 positions; optional.
Length	The length measurement for an item. The Height, Length, and Width values determine the cubic volume of an item. Can be entered in feet or centimeters, or any other measurement as long as it is consistent. Used in Suggest Location Placement (MSLO) when evaluating whether an item can be stored in a particular location. Numeric, 3 positions; optional.
Width	The width measurement for an item. The Height, Length, and Width values determine the cubic volume of an item. Can be entered in feet or centimeters, or any other measurement as long as it is consistent. Used in Suggest Location Placement (MSLO) when evaluating whether an item can be stored in a particular location. Numeric, 3 positions; optional.
Cube factor	The cubic volume of the item. Controls the number of units of this item that can fit into a carton. The system will compare the cube factor against the Cube field value from the System Control table, which defines a default box size. See Setting Up Fulfillment Values. <i>Example:</i> If the Cube field value in the System Control table is 100 and the Cube Factor for an item is 25, then 4 of this item can fit into one box.
Sell qty (Sell quantity)	Numeric, 3 positions; optional. The selling quantity defines the required order quantity (or multiple of) for this item. For example, an item may be stocked in single units, but must be sold in quantities of 6 (or 12, or 18, etc.). If an uneven amount is ordered during Order Entry, the system displays a message and forces the operator to enter a quantity which is a multiple of this number. Numeric, 5 positions; optional.

**Note:**

The Cube Factor is used to determine the number of pick slips generated.

Field	Description
Discountable	Determines whether certain discounts can be applied to the item. If this field is unselected, an item is not eligible for the discount percent at Order Entry or the discount percent defined for the source code or sold to customer's customer price group; however, the item is eligible for all other discounts. <i>selected</i> = This item is discountable. <i>unselected</i> = This item is not discountable. Non-discountable items are not included in the merchandise total for the purposes of evaluating whether the order qualifies for a promotional discount (set up through Working with Promotions (WPRO)) or dollar discount (set up through the Work with Offer Dollar Discounts Screen or the Work with Source Dollar Discounts Screen) if the discount requires an order minimum.
Non/inv (Non inventory)	Indicates whether inventory levels are maintained for the item. If selected, you can order this item, but the system never checks availability when reserving the item or generating a pick slip. However, non-inventory items sell out when flagged with a S/O control (Soldout control) code. You must select this flag for a subscription item (Subscription = <i>selected</i>); these items will be express billed. Pick slip preparation: The system: - Does not create a pre-generated pick for a non-inventory item if all other items on the order are backordered; when one or more backordered items are available, the system creates a pre-generated pick for the non-inventory item as well as for the available item(s). Note: If you select the Affect inv (Affect inventory?) flag on the Work with Order Lines screen in order entry, the system will create a pre-generated pick for the non-inventory item; however, this change will effect a change in inventory totals for the non-inventory item during order entry and when you ship the order. - Creates a pre-generated pick for a non-inventory item if all other items on the order are not selected for pick slip preparation; see Selecting Order Lines for Pick Slip Preparation. Printing pick slips: The item will still be included on a pick slip, as long as the ship via on the order is not an express bill. If you specify a location for a non-inventory item, this location appears on the pick slip; however, the location is not included in the normal sort sequence. <i>selected</i> = This is a non-inventory item. <i>unselected</i> = This is a regular item that will be tracked. Non-inventory items are not eligible for zone reservation. If you select this flag and try to assign a Zone reservation code to an item, the system displays the following error message: SKU not eligible for zone reservation code.
Oversize	Determines whether this item is considered an oversized item. Oversized items do not receive their own pick slip unless ship alone is indicated. This information is passed to TanData. <i>selected</i> = This is an oversized item. <i>unselected</i> = This is not an oversized item.
Hazard code	A user-defined code used to categorize an item as a hazardous material that requires special storage and/or handling. Validated against the Item Hazard table; see Working with Hazardous Item Codes (WHAZ). This information is passed to TanData. Alphanumeric, 2 positions; optional.

Field	Description
Loc class (Location class)	A code that represents a location type, such as caged area, etc. Both items and locations may be assigned location classes. Items can only be stored in locations that have the same location class. Only items with the same location class will appear on the same pick slip. Validated against the location class table; see Creating and Maintaining Location Classes (WLCL). If the Allow Location Class Edit in Inventory Transaction (F86) system control value is selected, the system validates the location class defined for the item against the location class defined for the location during inventory transaction processing. Alphanumeric, 2 positions; optional.
Pieces/case (Pieces per case)	The number of units that fit in a case. Used when suggesting location placement. Numeric, 5 positions; optional.
L/S style (Long SKU style)	A user-defined field that you can use for tracking and queries. Long SKU style can also be defined in the SKU table but is not validated. Required if the Use Retail Integration (H26) system control value is selected. The system requires a unique long SKU style code if the Require L/S Style (I94) system control value is selected. When you upload items into Order Administration, you can identify the item using a combination of long SKU department, long SKU class, long SKU style, long SKU vendor, long SKU color, long SKU size, and long SKU width; see Retail Integration (External System into Order Administration) Overview and Setup. Secured Feature If you do not have authority to the Maintain Long SKU Values in MITM (B05) secured feature, you can not enter or change this value. Alphanumeric, 20 positions; required if system control value is selected.
L/S vendor (Long SKU vendor)	A user-defined field that you can use for tracking and queries. Long SKU vendors are defined in the SKU table but are not validated. Secured Feature If you do not have authority under the Maintain Long SKU Values in MITM (B05) secured feature, you can not enter or change this value. Alphanumeric, 7 positions; optional.
Season	Defines the season associated with this item, such as spring. Season codes are defined in and validated against the Season table; see Working with Season Codes (WSEA). Alphanumeric, 3 positions; optional.
Royalty	This flag indicates whether sales of the item require royalty payments to an author or owner, and is used for query and reporting purposes only. Valid values are: <i>selected</i> = This is a royalty item <i>unselected</i> = This is not a royalty item

Field	Description
Entity	A business unit within your company that is held accountable for sales performance; for example, mail order, retail, or e-commerce. If the system control value Require Entity in Item File (G44) is selected, you must enter an entity code for each item you set up; entity codes for items and SKUs are defined at the item level. Informational only. An order is associated with an entity through the source code on the order header; for the purposes of accounting, tracking order history, determining vendor response codes, and overriding system control values at the entity level, this source code entity will override any entity assigned to an item on the order. See Setting Up Order Entry Values, and Setting Up Customer Service Values, for information on the system control values that determine how you use entity for these purposes. Entities are defined in an validated against the Entity table. See Working with Entities (WENT). Alphanumeric, 3 positions; required if the Require Entity in Item Table system control value is selected.
Ship via	A code that represents the shipper that must be used when shipping this item. When a customer orders the item, the system assigns this ship via code, but you or the system can override the ship via. You can set up an additional shipping charge for the item delivered by this ship via using the Create Ship Via/Item Screen for the ship via. See Working with Ship Via Codes (WVIA). Item Ship Via Override If item ship via overrides exist for the item, the ship via you define must exist in the Item Ship Via Override table or an error message indicates: Invalid ship via for item. Additionally, if you prompt on the Ship via field, the system displays the Work with Item Ship Via Overrides screen containing only those ship vias eligible to ship the item. When a customer orders the item, the system assigns this ship via code, but you or the system can override the ship via to another eligible ship via, based on records in the Item Ship Via Override table. If item ship via overrides do not exist for the item, you can define any valid ship via code in this field. See Working with Item Ship Via Overrides for more information on defining eligible shippers for an item. Alphanumeric, 3 positions; optional.
L/S Subclass	A user-defined field that you can use for tracking and queries. Long SKU subclass can also be defined in the SKU table but is not validated. Displayed and required only if the Use Retail Integration (H26) system control value is selected. Secured Feature If you do not have authority under the <i>Maintain Long SKU Values in MITM (B05)</i> secured feature, you can not enter or change this value. Numeric, 4 positions; required.
Carton	The type of carton in which this item must be shipped. If present, the carton ID is passed to TanData when confirming the item for shipment. This information is used to calculate best way shipping, which determines the lowest price to ship the carton. Numeric, 2 positions; optional.

Field	Description
Avail thrshld (Item-level availability threshold)	Indicates when to trigger an automatic download of item availability information through the generic inventory API. The system creates a trigger record for an item when its available quantity breeches the threshold, and an integration layer process generates the <i>Inventory Download XML Message (CWInventoryDownload)</i> message to send inventory information to an external system. See <i>Generic Inventory Download API</i> for an overview of message generation rules and processing. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Availability threshold hierarchy: If you leave this field blank, the system checks the Availability threshold (item class-level); if there is no item class-level setting, the system checks the Quantity Available Threshold for Inventory Downloads (G36) system control value. See this system control value for a complete description of how the availability threshold hierarchy works. Numeric, 5 positions; optional.
Rtl style (Retail Style #)	A user-defined code used to identify the item. Retail Integration (external system to Order Administration) When you upload item information into Order Administration, you can identify the item using the retail style number; see Working with Retail Integration Item Upload (RIIU). Alphanumeric, 20 positions; optional.

Field	Description
OROB eligible	Indicates whether to include this item when: • sending item and inventory information from Order Administration to Order Orchestration through a stored procedure; however, this flag does not control whether to include the item through an API that uses an XML message, such as the <i>Generic Item Download API</i> or the <i>Generic Inventory Download API</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). • sending backordered order lines to Order Orchestration for fulfillment. See Order Orchestration Integration for an overview, and see Rules for Submitting Backorders to Order Orchestration for more rules that govern eligibility for Order Orchestration. • sending ship-for-pickup orders to Order Orchestration. See Order Orchestration Integration for an overview, and see Ship-for-Pickup Orders for more details. Valid values: <i>Selected</i> (default) = Include this item when you use a stored procedure to send item and inventory information to Order Orchestration; also, the item is eligible to be sent to Order Orchestration on brokered backorders or ship-for-pickup orders. <i>Unselected</i> = Do not include this item when you use the stored procedure to send item and inventory information to Order Orchestration; also, the item is not eligible to be sent to Order Orchestration on brokered backorders or ship-for-pickup orders.  Note: When you upload items into Order Administration, this flag is <i>selected</i> by default; see Working with Retail Integration Item Upload (RIIU). Also, when you copy an item from one company to another, the flag is <i>selected</i> in the destination company.
SVC type	A code that indicates the item is a stored value card, and whether the stored value card is a physical or virtual card. • <i>blank</i> (default) = The item is not a stored value card. • <i>Physical</i> = The item is a physical stored value card. • <i>Physical/Early Notify</i> = The item is a physical stored value card and, as soon as the stored value card is processed through billing, the system sends an email notification to the recipient card holder on the order, notifying the customer that a stored value card has been purchased and is in the process of being delivered. • <i>Virtual</i> = The item is a virtual (non-physical) stored value card. See Creating a Stored Value Card Item for more information on setting up a stored value card item. Optional.

Field	Description
Voucher Type	Indicates the usage for a stored value card. Valid values are: • <i>Single-Purpose</i>: The stored value card is a voucher for one type of goods or service. • <i>Multi-Purpose or blank</i>: The stored value card is not a single-purpose voucher. You can select a voucher type only when the item is assigned an SVC Type. Pass hidden tax for CWInvoiceOut message? This field is used to determine whether to calculate hidden tax and pass it in the <i>Invoice Download XML Message (CWInvoiceOut)</i> for redemptions or credits against a single-use voucher that was created and sold in Order Administration on an order subject to VAT. See the Invoice Download XML Message (CWInvoiceOut) in the Order Administration Web Services Guide on My Oracle Support (2953017.1) for more information. Note: This field is not updated through integrations such as the retail integration item upload or the import from Omnichannel Cloud Data Service (OCDS), or passed in web service messages such as the item download XML message (CWItemOut).
User fields	There are 4 user-definable fields. You can define these fields according to your organization's specific requirements. The system defaults the Vendor user field 3 in Working with Vendors (WVEN) to the Item user field 3 field when you create or change an item and the program name <i>INR1156</i> has been defined in the User function field for the <i>CHGITEM</i> and <i>ADDITMSKU</i> user exit points. Alphanumeric, 10 positions (each field); optional.
External info	Indicates if the item is eligible for item retrieval from an external system. • <i>selected</i> = The item is eligible for item retrieval from an external system. • <i>unselected</i> = The item is not eligible for item retrieval from an external system. Selecting this flag allows you to search for a product in an external system based on the item number entered in Order Administration. For example, the item number in Order Administration may represent a high-level item category, such as “front wheel bearing.” When you enter the item in Order Administration, the system calls the external system so that you can select the specific front wheel bearing that fits the year, make, and model of the car for which the customer is requesting the part. Once the specific product number is selected within the external system, the system returns the product number to Order Administration. If the product number matches an item number in Order Administration, the system adds the item to the order or positions you to the item number in item availability or inventory inquiry.

Field	Description
Last chg date (Last change date)	The date the item, SKU of this item, or vendor item was last created or changed.

**Note:**

Included on the Display Item and Change Item screens only.

Numeric, 6 positions (HHMMSS format); display-only.

Completing this screen: If you are creating a SKU'ed item, you advance to the [Create Item Offer Screen](#). If you are creating a non-SKU'ed item, you advance to the [Create Item \(Base Information\) Screen](#).

Create Item (Base Information) Screen

Purpose: Use this screen to create SKU level information for a non-SKU'ed item.

How to display this screen: Complete the [Create Item Screen](#) with the SKUs field *unselected*.

Field	Description
Sort sequence number	The sequence number used to determine the order in which SKUs sort. You can use the sort sequence to display SKUs in a different order, such as by size, rather than alphanumerically by SKU code. See SKU Sort Sequence Numbers for an overview. Required if the Require Sort Sequence Number in the SKU File (F23) system control value is selected. Numeric, 5 positions; required if the Require Sort Sequence Number system control value is selected.
Cost	The cost of the item.

**Note:**

The [Display Cost in Inventory \(A38\)](#) secured feature controls the display of this field at the Change Item (Base Information) and Display Item (Base Information) screens.

The system does not calculate the cost automatically. However, you can update the standard cost with the landed cost (primary vendor item price + vendor additional charges) through:

- [Working with Vendor Items \(WVNI\)](#) or the Work with Item/SKUs screen, available by selecting *Vendor Item* for an item or SKU at the [Work with Items Screen](#). Only the vendor item cost associated with the item's primary vendor (appearing on the first Create/Change/Display Item screen) can update the item's standard cost.
- Numeric, 13 positions with a 4-place decimal; optional.

Field	Description
Short SKU(Display screen only)	A unique number that the system assigns to all items and SKUs. You can see this number only on display screens and not on any change or create screens. In Inventory Inquiry (<i>DINT</i>) see: Display SKU (Base Information) Screen (Non-SKU'ed Item) or Display SKU - 1 of 2 (With Overrides) Screen. In Work with Items (<i>MITM</i>) see: Display SKU (Base Information) screen or Display SKU screen. When passing item/SKU information in the e-commerce interface, the system uses the short SKU number instead of the alphanumeric value in the SKU field. See Downloading E-Commerce Offer Files (EOFR). Numeric, 7 positions; display-only.
Primary warehouse	A code that represents the primary warehouse where you keep the item. The Default Warehouse (A04) from the System Control table defaults here, but you can override it. Warehouse codes are defined in and validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions; required.
Warehouse maximum	The item's recommended maximum number of units for the warehouse from the previous field. Numeric, 7 positions; optional.
Warehouse minimum	The item's recommended minimum number of units for the warehouse defined previously. Numeric, 7 positions; optional.
Primary location	A code that represents the primary location in the warehouse where you stock the item; sometimes referred to as the “primary primary.” The location code you enter here will default in inventory transactions, purchase order receiving, etc. Location codes are defined in and validated against the Location table. See Creating and Maintaining Locations (WLOC). Typically, the location code is composed of a single alphanumeric character for Zone, and two numbers each for Aisle, Shelf, and Bin. For instance, the location A010201 indicates: Zone Aisle Shelf Bin A 01 02 01
Location maximum	Alphanumeric, 7 positions; optional. The item's recommended maximum number of units to be stored in the primary pick location, from the previous field. Numeric, 7 positions; optional.

 Note:

When you assign a location code to a non-inventory item, the location code will print on the pick slip if you use one of the base pick slip printing programs; however, the non-inventory item will not be sorted correctly on the batch pull sheet.

Field	Description
Location minimum	The item's recommended minimum number of units to be stored in the primary pick location, from the Primary location field. Numeric, 7 positions; optional.
Zone reservation code	A code assigned to weather-sensitive items such as plant stock to insure that the items will ship to different regions of the country within time windows suited to the regions. Items processed through the zone reservation program will not be reserved during order entry; instead they will be assigned a backorder status of Z (Zoned reservation), and will be reserved or backordered during pick generation, at an optimal time for shipping. Zone reservation processing requires: • The item/SKU must be assigned a zone reservation code • The offer associated with the order must be assigned a season code • The shipping address for the order must be assigned to a geographic zone • For each zone reservation code, you must define zone date windows for all geographic zones in the country
	 Note: Items specified as Drop ship items are not eligible for zone reservation codes.
	See Shipping Zone Reservation Overview. Alphanumeric, 4 positions; optional.
Reserve qty (Reserve quantity limit)	If the order quantity exceeds this amount, the system does not attempt to reserve the item when you enter the order, regardless of the setting of the Immediate Reservation (A64) system control value. You will need to use Working with Interactive Reservation (MIRV) to reserve the item on open orders. Order Orchestration: If you use the Order Orchestration Integration, the system submits the order line to Order Orchestration for fulfillment even if the line exceeds the reserve quantity limit, provided the line is eligible based on the Rules for Submitting Backorders to Order Orchestration. Numeric, 7 positions; optional.
Coordinate group	A code assigned to items to ensure that certain items ship together when ordered together. Items with the same coordinate group code will ship together through the same shipper. The coordinate group number assigned to an item will default when a customer orders the item. You may override this assignment. During pick slip preparation, the system does not create a pre-generated pick until all of the coordinate grouped items on the order are eligible for pick slip preparation. When you use Processing Auto Soldout Cancellations (MASO) to sellout an item, you have the option of placing all related coordinate grouped items on hold. Numeric, 3 positions; optional.

Field	Description
Item category	A code assigned to the item to classify and group like items for use in the Item Relationships function. The Compatibility field should also be completed to fully use the Item Relationships function. Validated against the Item Category table; see Working with Item Category Codes (WITG). Numeric, 4 positions; optional.
Compatibility	A user-defined code assigned to an item. You can enter this code in the Item Relationships function to review a list of other compatible items. For example, you might use a compatibility code to associate PC-compatible products. Alphanumeric, 3 positions; optional.
2nd compatblty (Second compatibility)	A user-defined code assigned to the item. Alphanumeric, 3 positions; optional.
Suppress backorder card	Indicates whether to produce a backorder card for the item. You might use this field to identify promotional items, free gifts, or catalogs, to prevent them from generating backorder cards or appearing on backorder lists. Valid values are: <i>selected</i> = Suppress normal backorder card generation for this item. <i>unselected</i> = Do not suppress normal backorder card generation. If the Unconditional Suppression of Backorder Card (F19) system control value is selected suppressed items will never appear on a backorder card. If this system control value is unselected, suppressed items will appear only on the first backorder card for the order, and only if an unsuppressed item triggers the backorder card when you use Generate Backorder Notices (GBOC).
Active PO	Indicates whether this is an active purchase order item for which you can accept orders before you expect to have inventory to fulfill. The OCDSFA and pre-order periodic functions, which are part of the Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing), set this flag and handle updates and orders for active purchase order items that are fulfilled through the integration with Order Orchestration. Possible settings: <i>selected</i> = This is an active purchase order item, and orders will be submitted to Order Orchestration as inventory becomes available. <i>unselected</i> = This is not an active purchase order item. This flag is not displayed at item creation, and you cannot change its setting at a screen. Only the periodic functions mentioned above update this flag. Display-only.

Field	Description
VAT exempt	Controls whether the item is exempt from VAT or conventional tax. Has a different effect depending on how the Tax Included in Price (E70) system control value is set. If the Tax Included in Price (E70) system control value is selected <i>selected</i> = The item is exempt from both VAT and conventional tax. On orders subject to VAT, the customer pays the regular (tax-exclusive) price for the item. <i>unselected</i> = The item is subject to VAT and tax-inclusive pricing and/or conventional tax. If the Tax Included in Price (E70) system control value is selected: <i>selected</i> = The item is exempt from tax only if there is a tax rate defined in the VAT % field for the customer's country. <i>unselected</i> = The item is subject to tax. You can also define tax exemptions for an item in a particular U.S. state or Canadian province. See Working with GST Tax Exemption Status (MGTX).
Hidden tax amt (Hidden tax amount)	The amount to include in the Hidden tax field for an item subject to VAT. On orders subject to VAT and tax-inclusive pricing, tax does not accumulate in the Tax bucket for the order; instead, you charge a tax-inclusive price for items, and the tax is "hidden" on the order detail line. You can define either a hidden tax amount or a percentage on this screen, but not both. If you do not define either, the item takes the VAT percentage defined for the customer's country. See How Hidden Tax is Calculated by Percentage for more information. Included only if the Tax Included in Price (E70) system control value is selected Numeric, 13 positions with a 2-place decimal; optional.
Hidden tax pct (Hidden tax percentage)	The percentage to use when calculating hidden tax for an item subject to VAT. On orders subject to VAT and tax-inclusive pricing, tax does not accumulate in the Tax bucket for the order; instead, you charge a tax-inclusive price for items, and the tax is "hidden" on the order detail line. You can define either a hidden tax amount or a percentage on this screen, but not both. If you do not define either, the item takes the VAT percentage defined for the customer's country. See How Hidden Tax is Calculated by Percentage for more information. Included only if the Tax Included in Price (E70) system control value is selected. Numeric, 5 positions with a 2-place decimal; optional.

Field	Description
Restrict	Indicates whether this item can be ordered. <i>selected</i> = You cannot add this item to an order, and demand is not captured. <i>unselected</i> = You can add this item to an order, and demand is captured. Note: If there were existing orders for this item before it became “restricted,” those orders are processed normally.
S/O control (Soldout control)	A code that represents how you determine when an item is sold out. If you leave this field blank, the item will never sellout automatically in Order Entry. You define soldout control codes in the Soldout Control table with one of the three following statuses: - Sellout the item immediately. (An item must be coded to sellout immediately in order to be picked up by Processing Auto Soldout Cancellations (MASO).) - Sellout the item when the quantity available is zero, not including open purchase orders. - Sellout the item when the quantity available is equal to zero, including open purchase orders. See Working with Soldout Controls (WSLD) and Soldout Calculation. You can define a Default Soldout Control Code (D72) to default automatically when you create items and SKUs; however, you can override this value. The system might also override the soldout control code when you use the Process Auto Soldouts function. If the Disregard Soldout Controls for Non-Allocatable Warehouses (J27) system control value is <i>selected</i>, the system disregards soldout control rules for items reserved against a non-allocatable warehouse. If the item cannot be reserved, the system backorders the item in the non-allocatable warehouse. See this system control value for more information. Alphanumeric, 2 positions; optional.
Subscription	Indicates whether the item is a subscription, such as a newsletter. Valid values are: <i>selected</i>= Item is a subscription. <i>unselected</i> = Item is not a subscription. If you identify an item as a subscription item, - you must select the Non/inv (non- inventory) field to indicate that inventory levels are not maintained for the subscription item and that customer will be billed (the full price of the subscription) immediately through Express Billing. - you must create a record for the subscription in the Item Subscriptions table to define the particulars of the subscription, such as the current issue number, length of subscription (number of intervals and number of days between issues). See Working with Item Subscriptions (WISB).

Field	Description
Low price	The lowest recommended sale price for the item; however, the item can be sold at a lower price. No message displays in Order Entry if you go below this price. Numeric, 13 positions with a 2-place decimal; optional.
List price	The system uses this price when you process item to item transfers (inventory transaction code = G). The list price of the source and target items must be identical, or the system will not allow you to process the transfer. If you are changing the quantity as part of the transfer, the system will confirm that the list price of the source item is the same as the list price of the target item based on the target item's quantity. For example, if the target item will constitute a set of three of the source item, the list price of the target item should be three times the list price of the source item. Numeric, 13 positions with a 2-place decimal; optional.
Reference # (Reference number)	Represents the retail reference or alternate product number. You can use this value to cross-reference an item/SKU to an external system, such as through the <i>Generic Inventory Transaction Upload</i> or the <i>Generic Order Interface (Order API)</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). The retail reference number is set to the same value as the item code when you create items through Importing Enterprise Foundation Data through Omnichannel Cloud Data Service (OCDS), and the number should not be changed. This number is also used for the Integration with the Sales Audit Module of the Oracle Retail Merchandising Foundation Cloud Service. Numeric, 15 positions; optional.
Orig retail \$	The original price of the item at the retail store. Informational only. Numeric, 13 positions with a 2-place decimal.

Field	Description
Projected returns	The number of units you expect to receive in returns for the item. The system uses this quantity when determining whether to sell out an item in order entry or maintenance if the item has a soldout control status of 2 (include on-order quantity in soldout calculation). The system backorders the projected return total plus the on-order quantity on unreceived purchase orders before selling out the item. For example, if you had 0 units on-hand, 10 units on an open purchase order, and entered 10 in this field, the system would backorder the first 20 units you entered in order entry, and sell out any units ordered after that. <i>Automatic field update:</i> When a return is processed, the system automatically subtracts the number of units returned from the number you initially entered in the Projected returns field. The number in this field will never be less than 0, however. For example, if you initially entered 10 in the Projected returns field, and 11 units of this item are returned, the Projected returns field will show a value of 0 when the return is processed. Note: Updating this field does not affect any orders already entered. See Working with Soldout Controls (WSLD) for more information on working with soldout control codes and how they work with projected return quantities. Numeric, 7 positions; optional.
Harmonize	A code that prints on customs documents for international shipments. If you charge duty on international orders, you use this field to define the item's duty rate. The system compares this value with the duty rates defined for the country of the shipping address, and adds a duty charge to the order if it finds a match. See Setting Up the Country Table (WCTY) for more information on defining duty rates for a country. You can also update the harmonize codes for multiple items quickly through the Update Harmonize Codes function; see Updating Harmonize Codes (UPHC). Alphanumeric, 16 positions; optional.
Return/vendor	Indicates whether the item is eligible for return; informational only. Valid values are: <i>selected</i> = The item is eligible for return <i>unselected</i> (default) = This item is not eligible for return
Country of origin	A code representing the country where the SKU originated. Used by the World Pack interface to determine duty for shipments to certain countries. Country codes are defined in and validated against the Country table; see Setting Up the Country Table (WCTY). Alphanumeric, 3 positions; optional.
L/S color (Long SKU color)	A code, typically used in a retail environment, that represents the color portion of the Long SKU code. Used for reporting purposes. Numeric, 5 positions; optional.

Field	Description
L/S size (Long SKU size)	A code, typically used in a retail environment, that represents the size portion of the Long SKU code. Used for reporting purposes. Numeric, 5 positions; optional.
L/S width (Long SKU width)	A code, typically used in a retail environment, that represents the width portion of the Long SKU code. Used for reporting purposes. Numeric, 5 positions; optional.
User fields	There are 5 user-definable fields. You can define these fields according to your organization's specific requirements. Alphanumeric, 10 positions (first 3 fields); 5 positions (last 2 fields); optional.

Completing this screen: You advance to the [Create Vendor Item Screen](#) if the [Auto Advance to Vendor Item Create \(E78\)](#) system control value is selected; otherwise, you advance to the [Create Item Offer Screen](#).

Create Item Offer Screen

Purpose: Use this screen to assign an offer to an item.

How to display this screen:

- You advance to this screen automatically when you create a SKU'd or non-SKU'd item if the [Auto Advance to Item Offer \(J05\)](#) system control value is selected; see [Creating Items Screen Flow](#).
- Select *Create* at the [Work with Item Offers Screen](#).

Field	Description
Offer (Offer code)	The code for the offer (catalog) in which the item appears. Validated against the Offer table. See Working with Offers (WOFR) . Alphanumeric, 3 positions; required.
Effective date	The date the price indicated becomes valid. This date should be on or later than the start date of the offer, and on or before the stop date of the offer. If you leave this field blank, the effective date of the offer defaults. Numeric, 6 positions (in user date format); optional.
Sub page	Informational only. You can use this field to call an external program that creates an item alias outside of Order Administration. The system provides a "hook" to the program when you defines a sub page code on this screen or the Create Item/SKU Offer screen in Creating Item/SKU Offers (MISO) . Once the program completes, Order Administration returns to normal processing. Alphanumeric, 5 positions; optional.

Field	Description
Price	The price at which the item will be sold in this offer, if no discounts are applied, and the order date is on or after the effective date. You can establish multiple effective dates and prices for the same item/offer. If there are multiple effective dates and prices, the single-unit price with the latest date is displayed here, even if the date is in the future. Although you can enter a price in this field for a variable set item, the price is informational only; the system prices variable set items by the total price of the set's components. See Entering Variable Set Information (WVST). Numeric, 13 positions with a 2-place decimal; required.
Associate price	The price at which the item will be sold in this offer to associate customers. Associate price is used when the Associate field on the order is selected (yes) and the order date is on or after the effective date. Numeric, 13 positions with a 2-place decimal; optional.
Tax inclusive price	The price at which the item will be sold in this offer on orders subject to VAT. In tax-inclusive pricing, a "hidden tax" is included in the order detail line for the item rather than accumulating in the Tax bucket. Included only if the <i>Tax Included in Price (E70)</i> system control value is selected. An error message indicates in order entry if an order is subject to VAT but no tax-inclusive price has been defined. Numeric, 13 positions with a 2-place decimal; optional.
Tax incl assoc price (Tax-inclusive associate price)	The price at which the item will be sold to associate customers on orders subject to VAT. In tax-inclusive pricing, a "hidden tax" is included in the order detail line for the item rather than accumulating in the Tax bucket. F Included only if the <i>Tax Included in Price (E70)</i> system control value is selected. Numeric, 13 positions with a 2-place decimal; optional.
Special handling	Indicates whether this item is eligible for any type of special handling in this offer (such as monogramming, hemming, etc.). <i>selected</i> = This item is eligible for special handling. <i>unselected</i> = This item is not eligible for special handling. If this field is selected and there is a default special handling code defined (see below), <i>OR</i> if you specify special handling for an item in order entry, you advance to the Work with Special Handling Screen or the Work with Custom Special Handling Screen; however, if the special handling code's: Suppress S/H window field is selected: the system adds the special handling code and charge to the item without displaying the special handling screen. Bypass S/H field is selected: you do not advance automatically to the special handling screen unless you enter the special handling code when entering the item; however, you can still advance to the special handling screen by selecting <i>Special Handling</i> for the item. See Special Handling Overview for more information.

Field	Description
S/H price (Special handling price)	The price to charge the customer for special handling. You can specify in the Evaluate Special Handling Charges by Order Line (D67) system control value whether to add the price just once for each order line, or multiply the special handling price by the item quantity for the line. An error message similar to the following indicates that you defined a special handling price and the Special handling field is unselected: Special handling price not allowed when not eligible. If you specify a price here for a custom special handling code, it overrides any pricing defined for the custom special handling format; see Establishing Custom Special Handling Formats (WSHF). Numeric, 13 positions with a 2-place decimal; optional.
S/H code (Special handling code)	The additional charge code associated with the type of special handling you are offering for the item. The system validates that the additional charge code is defined as special handling type standard or custom; the system handles each type in a different way. See Special Handling Overview for more information. If you enter a special handling code here, you will advance to the Work with Special Handling Screen or Work with Custom Special Handling Screen automatically in order entry; however, if the special handling code's: • Suppress S/H window field is selected: the system adds the special handling code and charge to the item without displaying the special handling screen. • Bypass S/H field is selected: you do not advance automatically to the special handling screen unless you enter the special handling code when entering the item; however, you can still advance to the special handling screen by selecting Special Handling for the item. See Special Handling Overview for more information. Alphanumeric, 2 positions; optional.
Gift wrap	Indicates whether gift wrapping is available for this item. If the Gift Wrap Default (F07) system control value is selected, this field defaults to selected, although you can override it; otherwise, this field defaults to unselected. • <i>selected</i> = This item can be gift wrapped. • <i>unselected</i> = In this offer, gift wrapping is not available for this item.
G/W price (Gift wrap price)	The price in this offer for gift wrapping the item. The gift wrap field must be selected to indicate that this item is eligible for gift wrap. The gift wrap price will be charged for each unit of this item that is gift wrapped. Numeric, 13 positions with a 2-place decimal; optional.
Freight	The freight amount to be charged for this item. The amount here is multiplied by the quantity ordered. Used only if the Freight method field for the Source Code table is set to <i>By Item</i> or <i>Flat Rt/Item</i>. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Hidden freight	Used only with item level freight methods, such as: Flat rate by item, flat rate by item quantity, flat rate by item source, and by item. Hidden freight represents the portion of the item's catalog price that is used for freight. You might define a hidden freight value when the freight charge to ship the item is very high. The hidden freight charge is included in the price of the item so the actual freight charge is not visible to the customer. Hidden freight is also known as “theoretical” or “buried” freight. Numeric, 13 positions with a 2-place decimal; optional.
Sale item	Indicates whether the item is on sale. Valid values are: <i>selected</i> = This is a sale item. <i>unselected</i> (default) = This is not a sale item. If the Exclude Sale Item When Prorating Discounts (I65) system control value is selected, this flag controls whether the item is included in prorated discounts or when determining whether an order qualifies for a promotion. See the system control value for more information.
Volume discount	Indicates whether this item is eligible for an end-of-order discount that will be applied when you accept the order during Order Entry. <i>selected</i> = The item/SKU is eligible for the volume discount. <i>unselected</i> = The item/SKU is not eligible for the volume discount. See Item Volume Discounting
Coupon discount \$ (Coupon discount dollars)	Represents the amount that is subtracted from the price when the item/SKU is ordered from this offer. Numeric, 13 positions with a 2-place decimal; optional.
Coupon expiration date	The date the coupon expires. Numeric, 6 positions (in user date format); optional.
Feature/option	Indicates whether the item is considered a featured or optional item in a depiction. A depiction is a photograph or drawing of several items within an offer. The featured item is the focus of the depiction; whereas, the optional items are less prominently displayed. For example, if a dining room is depicted, the dining room set may be the featured item and the individual place settings, crystal, and centerpiece may be the optional items. Valid values are: <i>Feature</i> = Item is the featured item in the depiction. <i>Option</i> = Item is an optional item in the depiction. Optional.

Field	Description
Column pricing	Determines whether this item is eligible for column pricing discounts. <i>selected</i> = The item is eligible for column pricing discounts. You advance to an additional screen where you can define the effective date, quantity, price, associate price, and pricing column. <i>unselected</i> = The item is not eligible for column pricing discounts. <i>What is column pricing?</i> In customer maintenance, you can assign a customer to a pricing column. This means that the customer will be charged the column price, even if the customer does not order the number of units specified for the price break. If the customer orders more units than specified in the column assignment, the price break at the next level will be used on the order. <i>Example:</i> <pre>Quantity Price Assoc. Price Column 1 \$100.00 \$95.50 01 5 \$ 90.00 \$85.50 02 10 \$ 80.00 \$75.95 03</pre> You can create as many price breaks as you like.
Pickup/new	Indicates whether the item has been carried over from a previous offer or is new to your product offerings. Valid values are: <i>Pickup</i> = Item is a pickup item, previously sold in another offer. <i>New</i> = Item is a new addition in this offer. Optional.
Warranty	Defines whether the item in this offer is a warranty item. Valid values are: <i>selected</i> = The item in this offer is a warranty item. When an operator adds this item to an order in order entry or order maintenance, the system adds the item to the order at no charge. <i>unselected</i> = The item in this offer is not a warranty item. - If the Default Price Override Reason for Warranty Items (G01) system control value contains a price override reason code, the system defaults this code to the Price override code field; otherwise, the operator must enter a code.

Field	Description
Required reason code	Defines whether an Order addition reason code is required when the item in this offer is added to an order in order entry or order maintenance. When you specify an add reason code for an item, there is a record of the add reason code stored in an order line history record, available for review at the Display Order Line History Screen. Valid values are: <i>selected</i> = The item in this offer requires an add reason code when the item is added to an order in order entry or order maintenance. The Enter Add Reason Window opens when an operator adds this item to an order in order entry or order maintenance. <i>unselected</i> = The item in this offer does not require an add reason code when the item is added to an order in order entry or order maintenance.



Note:

When the item is added automatically to an order through the order API, the add reason code is not required. For example, an item might be added to an order automatically if it is set up as a free gift by source code.

Completing this screen: If you advanced to this screen through initial item creation, you return to the [Create Item Screen](#).

Select *Exit* at this screen if you do not want to create an item/offer.

Create SKU 1 of 2 (With Overrides) Screen

Purpose: Use this screen to create a SKU for a SKU'd item.

How to display this screen:

- You advance to this screen automatically when you create a SKU'd item if the [Auto Advance to SKU Create \(B34\)](#) system control value is *selected* and the [Auto Advance to SKU Generator \(J06\)](#) system control value is *unselected*. See [Creating SKU'ed Items Screen Flow](#).
- Select *Create* at the [Work with SKUs Screen](#).

Completing this screen: Select *OK* to advance to the [Create SKU 2 of 2 \(With Overrides\) Screen](#). This screen contains additional SKU attributes, including those related to long SKU and physical dimensions.

After you create a SKU, the system returns you to this screen, allowing you to create another SKU. You can select *Exit* when you have finished creating all SKUs.

You can also select *Exit* if you wish to create a SKU'ed item without creating the individual SKUs at this time.

Field	Description
Clr/Size/Wdth	The SKU elements, such as color or size, that identify the item further. Elements are defined in the System Control table and validated against the SKU Element (1,2,3) tables. An item does not require all 3 elements. Alphanumeric, three 4-position fields; required.
Description (Unlabeled field to the right of the SKU field(s))	The description of the SKU element. The system displays the SKU description in place of the SKU elements in order entry, order maintenance and standard and streamlined order inquiry if the Display SKU Description in place of SKU Element (F25) system control value is <i>selected</i>. Alphanumeric, 40 positions; optional.
Second language description	Not currently implemented. Alphanumeric, 40 positions; optional.
Sort sequence # (SKU sort sequence number)	The sequence number used to determine the order in which SKUs sort. You can use the sort sequence to display SKUs in a different order, such as by size, rather than alphanumerically by SKU code. See SKU Sort Sequence Numbers for an overview. Required if the Require Sort Sequence Number in the SKU File (F23) system control value is <i>selected</i>. Numeric, 5 positions; required if the Require Sort Sequence Number system control value is <i>selected</i>.
Cost	The cost of the item. This cost defaults from the base item but may be overridden for the SKU being created.

**Note:**

The [Display Cost in Inventory \(A38\)](#) secured feature controls the display of this field at the Change SKU 1 of 2 (With Overrides) and Create SKU 1 of 2 (With Overrides) screens.

Standard costing: The system does not calculate a new standard cost automatically. However, you can update the standard cost with the landed cost (primary vendor item price + vendor additional charges) through:

- [Working with Vendor Items \(WVNI\)](#) or the Work with Item/SKUs screen, available by selecting *Vendor Item* for an item or SKU at the [Work with Items Screen](#). Only the vendor item cost associated with the item's primary vendor (appearing on the first Create/Change/Display Item screen) can update the item's standard cost.

Field	Description
Short SKU(Display screen only)	A unique number that the system assigns to all items and SKUs. You can see this number only on display screens, not on change or create screens. In Inventory Inquiry (<i>DINI</i>) see: Display SKU (Base Information) Screen (Non-SKU'ed Item) or Display SKU - 1 of 2 (With Overrides) Screen. In Work with Items (<i>MITM</i>) see: Display SKU (Base Information) screen or Display SKU screen. When passing item/SKU information in the e-commerce interface, the system uses the short SKU number instead of the alphanumeric value in the SKU field. See Downloading E-Commerce Offer Files (EOFR). Numeric, 7 positions; display-only.
Primary warehouse	A code that represents a warehouse where this item is stocked. The default warehouse code from the System Control table defaults here, but you can override it. Warehouse codes are defined in and validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions; required.
Warehouse maximum	The SKU's recommended maximum number of units for the warehouse specified in the Warehouse field. Numeric, 7 positions; optional.
Warehouse minimum	The SKU's recommended minimum number of units for the warehouse specified in the Warehouse field. Numeric, 7 positions; optional.
Primary location	A code that represents an area within the warehouse that contains the item/SKU. Sometimes referred to as the "primary primary." Validated against the Location table. Typically, the location code is composed of a single alphanumeric character for Zone, and two numbers each for Aisle, Shelf, and Bin. For instance, the location A010201 indicates: <pre>Zone Aisle Shelf Bin A 01 02 01</pre>
Location maximum	Alphanumeric, 7 positions; optional. The SKU's recommended maximum number of units to be stored in the primary pick location. The primary pick location refers to the code in the Location field, displayed on this screen. Numeric, 7 positions; optional.



Note:

When you assign a location code to a non-inventory item, the location code will print on the pick slip if you use one of the base pick slip printing programs; however, the non-inventory item will not be sorted correctly on the batch pull sheet.

Field	Description
Location minimum	The SKU's recommended minimum quantity to be stored in the primary pick location. The primary pick location refers to the code in the Location field, displayed on this screen. Numeric, 7 positions; optional.
Reserve qty. (SKU reserve limit exceed)	If the order quantity exceeds this amount, the system does not attempt to reserve the item when you enter the order, regardless of the setting of the Immediate Reservation (A64) system control value. You will need to use Working with Interactive Reservation (MIRV) to reserve the item on open orders. Numeric, 7 positions; optional.
Zone reservation	A code assigned to weather-sensitive items/SKUs such as plant stock to insure that the items will ship to different regions of the country within time windows suited to the regions. Items/SKUs processed through the zone reservation program will not be reserved during order entry; instead they will be reserved during pick generation, at an optimal time for shipping. <i>Zone reservation processing requires:</i> • The SKU must be assigned a zone reservation code • The offer associated with the order must be assigned a season code • The shipping address for the order must be assigned to a geographic zone • For each zone reservation code, you must define zone date windows for all geographic zones in the country

 Note:

Items specified as [Drop ship](#) items are not eligible for zone reservation codes at the SKU level.

 Note:

If you have not set up the required values for zone reservation processing, a zone reservation coded item will follow standard order entry processing, except that if the item is backordered, it will not be reserved through the Evaluate Backorders process. You can reserve the item through [Working with Interactive Reservation \(MIRV\)](#).

See [Shipping Zone Reservation Overview](#).

Alphanumeric, 4 positions; optional.

Field	Description
Coordinate group	A code that may be assigned to item/SKUs to ensure that certain item/SKUs ship together when ordered together. Item/SKUs with the same coordinate group code will ship together through the same shipper. The coordinate group number assigned to an item/SKU will default in Order Entry when the item/SKU is ordered. You may override this assignment. The system does not create a pre-generated pick for order lines that are assigned the same coordinate group number until all of the coordinate grouped lines are eligible for pick slip preparation. When you use Processing Auto Soldout Cancellations (MASO) to sell out an item, you have the option of placing all related coordinate group items on hold. Numeric, 3 positions; optional.
Item category	A code assigned to the SKU to classify and group like item/SKUs for use in the Item Relationships function. The Item Category is a level below the Item Class. For example, if the item class assignment is “Software Products,” the Item Category assignment might be “Word Processing Software” to subgroup and sort similar items. Validated against the Item Category table; see Working with Item Category Codes (WITG). Numeric, 4 positions; optional.
Compatibility	A user-defined code assigned to an item/SKU. You can enter this code in the Item Relationships function to display a list of other compatible items or SKUs. <i>Example:</i> You can assign a compatibility code of 01 to an IBM-compatible computer and to other items such as printers, network cards, etc. Alphanumeric, 3 positions; optional.
2nd compatibility	Not currently implemented. Alphanumeric, 3 positions; optional.
Sup B/O card (Suppress backorder card)	Indicates whether to produce a backorder card for the SKU. You might use this field to identify promotional items, free gifts, or catalogs, to prevent them from generating backorder cards or appearing on backorder lists. Valid values are: <i>Selected</i> = Suppress normal backorder card generation for this item. <i>Unselected</i> = Do not suppress normal backorder card generation. If the Unconditional Suppression of Backorder Card (F19)Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing) system control value is <i>selected</i>, suppressed SKUs will never appear on a backorder card. If this system control value is <i>unselected</i>, suppressed SKUs will appear only on the first backorder card for the order, and only if an unsuppressed item triggers the backorder card generation.

Field	Description
Active PO	Indicates whether this is an active purchase order item for which you can accept orders before you expect to have inventory to fulfill. The OCDSFA and pre-order periodic functions, which are part of the , set this flag and handle updates and orders for active purchase order items that are fulfilled through the integration with Order Orchestration. Possible settings: <i>selected</i> = This is an active purchase order item, and orders will be submitted to Order Orchestration as inventory becomes available. <i>unselected</i> = This is not an active purchase order item. This flag is unselected at item creation. Display-only.
VAT exempt	Controls whether the SKU is exempt from VAT and tax-inclusive pricing. The SKU will still be subject to conventional tax, in which the tax amount accumulates in the Tax bucket, on any order subject to conventional tax rather than VAT. Valid values are: <i>Selected</i> = This SKU is exempt form VAT and tax-inclusive pricing. <i>Unselected</i> = This SKU is subject to VAT and tax-inclusive pricing. Effective only if the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i>.
Hidden tax amt (Hidden tax amount)	The amount to include in the Hidden tax field for an item subject to VAT. On orders subject to VAT and tax-inclusive pricing, tax does not accumulate in the Tax bucket for the order; instead, you charge a tax-inclusive price for items, and the tax is "hidden" on the order detail line. You can define either a hidden tax amount or a percentage on this screen, but not both. If you do not define either, the SKU takes the VAT percentage defined for the customer's country. Included only if the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i>. Numeric, 13 positions with a 2-place decimal; optional.
Hidden tax pct (Hidden tax percentage)	The percentage to use when calculating hidden tax for an item subject to VAT. On orders subject to VAT and tax-inclusive pricing, tax does not accumulate in the Tax bucket for the order; instead, you charge a tax-inclusive price for items, and the tax is "hidden" on the order detail line. You can define either a hidden tax amount or a percentage on this screen, but not both. If you do not define either, the SKU takes the VAT percentage defined for the customer's country. See How Hidden Tax is Calculated by Percentage for more information. Included only if the <i>Tax Included in Price (E70)</i> system control value is <i>selected</i>. Numeric, 5 positions with a 2-place decimal; optional.

Field	Description
Restrict	Indicates whether you can accept an order for this item/SKU in Order Entry and whether demand is captured. <i>Selected</i> = The operator cannot accept an order for this item/SKU. <i>Unselected</i> = The operator can accept an order for this item/SKU. Note: If there were existing orders for this item before it became “restricted,” those orders are processed normally.
S/O control (Soldout control)	A code that represents how you determine when an item/SKU is soldout. If you leave this field blank, the item/SKU will never sellout automatically in Order Entry. You define soldout control codes in the Soldout Control table with one of the three following statuses: - Sellout the item/SKU immediately. - Sellout the item/SKU when the quantity available is zero, not including open purchase orders. - Sellout the item/SKU when the quantity available is equal to zero, including open purchase orders. (An item must be coded to sellout immediately in order to be picked up by Processing Auto Soldout Cancellations (MASO).) You can define a Default Soldout Control Code (D72) in the System Control table to default automatically when you create items and SKUs; however, you can override this value. See Working with Soldout Controls (WSLD). If the Disregard Soldout Controls for Non-Allocatable Warehouses (J27) system control value is <i>selected</i>, the system disregards soldout control rules for items reserved against a non-allocatable warehouse. If the item cannot be reserved, the system backorders the item in the non-allocatable warehouse. See this system control value for more information. Alphanumeric, 2 positions; optional.
Subscription	Indicates whether the item is a subscription item. Valid values are: <i>Selected</i> = Item is a subscription item <i>Unselected</i> = Item is not a subscription item If you identify an item as a subscription item, you must - select the Non/inv (non- inventory) field to indicate that inventory levels are not maintained for the subscription item and that customer will be billed (the full price of the subscription) immediately through Express Billing. - create a record for the subscription in the Item Subscriptions table to define the particulars of the subscription, such as the current issue number, length of subscription (number of intervals and number of days between issues). See Working with Item Subscriptions (WISB).

Field	Description
Low price	The lowest recommended sale price for the item/SKU; however, the item/SKU can be sold at a lower price. No messages are displayed in Order Entry. Numeric, 13 positions with a 2-place decimal; optional.
List price	The system uses this price: 1. When you process item to item transfers (inventory transaction code = <i>G</i>). The list price of the source and target items must be identical, or the system will not allow you to process the transfer. If you are changing the quantity as part of the transfer, the system will confirm that the list price of the source item is the same as the list price of the target item based on the target item's quantity. For example, if the target item will constitute a set of three of the source item, the list price of the target item should be three times the list price of the source item. 2. As the initial price of an item during customer price group line level pricing if the Price Type for the selected customer price group is <i>Regular</i>; see Working with Customer Price Groups (WCPG). Numeric, 13 positions with a 2-place decimal; optional (required if you process an item to item transfer).
Reference # (Reference number)	Represents the retail reference or alternate product number. You can use this value to cross-reference an item/SKU to an external system, such as through the <i>Generic Inventory Transaction Upload</i> or the <i>Generic Order Interface (Order API)</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). The retail reference number is set to the same value as the item code when you create items through Importing Enterprise Foundation Data through Omnichannel Cloud Data Service (OCDS), and the number should not be changed. This number is also used for the Integration with the Sales Audit Module of the Oracle Retail Merchandising Foundation Cloud Service. Numeric, 15 positions; optional.
Orig retail \$	The original price of the item at the retail store. The system uses this price as the initial price of an item during customer price group line level pricing if the Price Type for the selected customer price group is <i>Original</i>; see Working with Customer Price Groups (WCPG). Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Projected returns	The number of units you expect to receive in returns for the item. The system uses this quantity when determining whether to sell out an item in order entry or maintenance if the item has a soldout control status of 2 (include on-order quantity in soldout calculation). The system backorders the projected return total plus the on-order quantity on unreceived purchase orders before selling out the item. For example, if you had 0 units on-hand, 10 units on an open purchase order, and entered 10 in this field, the system would backorder the first 20 units you entered in order entry, and sell out any units ordered after that. <i>Automatic field update:</i> When a return is processed, the system automatically subtracts the number of units returned from the number you initially entered in the Projected returns field. The number in this field will never be less than 0, however. For example, if you initially entered 10 in this field, and 11 units of this item are returned, the Projected returns field will show a value of 0. Note: Updating this field does not affect any orders already entered. See Working with Soldout Controls (WSLD) for more information on working with soldout control codes and how they work with projected return quantities. Numeric, 7 positions; optional.
Harmonize (Harmonize code)	A code that prints on customs documents for international shipments. If you charge duty on international orders, you use this field to define the item's duty rate. The system compares this value with the duty rates defined for the country on the shipping address, and adds a duty charge to the order if it finds a match. See Setting Up the Country Table (WCTY) for more information on defining duty rates for a country. You can also update the harmonize codes for multiple items quickly through the Update Harmonize Codes function; see Updating Harmonize Codes (UPHC). Alphanumeric, 16 positions; optional.
Return/vendor	Indicates whether the item is eligible for return; informational only. Valid values are: • <i>Selected</i> = The item is eligible for return • <i>Unselected</i> (default) = This item is not eligible for return
Prep code	A code used to indicate any special preparation or handling required for the SKU. Informational only. Alphanumeric, 2 positions; optional.
Country of origin	A code representing the country where the SKU originated. Used by the World Pack interface to determine duty for shipments to certain countries. Country codes are defined in and validated against the Country table; see Setting Up the Country Table (WCTY). Alphanumeric, 3 positions; optional.

Field	Description
User fields	There are 5 user-definable fields. You can define these fields according to your organization's specific requirements. Alphanumeric, 10 positions (first 3 fields) 5 positions (last 2 positions); optional.

Create SKU 2 of 2 (With Overrides) Screen

Purpose: Use this screen to enter additional information for a SKU.

The values you enter in the "override" section of the screen override the values you entered for the base item. If you leave any of these fields blank and you have entered values at the base item level, the system uses the base item values. For example, if you leave height, length, and width blank and there is a height, length, or width defined at the base item level, the system uses the values at the base item level.

How to display this screen: Select *OK* at the [Create SKU 1 of 2 \(With Overrides\) Screen](#).

Completing this screen: When you select *OK* at this screen, the system:

- If the [Auto Advance to Vendor Item Create \(E78\)](#) system control value is *selected*, automatically advances you to the [Create Vendor Item Screen](#).
- If the [Auto Advance to Vendor Item Create \(E78\)](#) system control value is *unselected*, creates the SKU after validating your entries and highlighting any errors, if necessary.

After you create a SKU, the system returns you to the [Create SKU 1 of 2 \(With Overrides\) Screen](#), allowing you to create another SKU. You can select *Exit* when you have finished creating all SKUs.

Field	Description
Description (Unlabeled field to the right of the SKU field(s))	The description of the SKU element. The system displays the SKU description in place of the SKU elements in order entry, order maintenance and standard and streamlined order inquiry if the Display SKU Description in place of SKU Element (F25) system control value is <i>selected</i> . Alphanumeric, 40 positions; optional.
Second language description	Not currently implemented. Alphanumeric, 40 positions; display-only.

Field	Description
L/S class (Long SKU class)	A code you can use to group items into classes for reporting purposes. If you defined a L/S class for the base item it defaults here, but you can override it. Long SKU classes are defined in and validated against the Long SKU Class table; see Working with Long SKU Classes (WLSC). Retail Integration (external system to Order Administration) If the <i>Use Retail Integration (H26)</i> system control value is <i>selected</i>, long SKU classes are linked to long SKU departments and are called retail classes. Retail classes are department specific whereas regular long SKU classes are unique and remain constant across departments. For this reason, when the <i>Use Retail Integration (H26)</i> system control value is <i>selected</i>, you can only enter a retail class in this field that is assigned to the base item's long SKU department. If you enter a long SKU class that is not linked to the base item's long SKU department, the system will not let you proceed and displays an error message: L/S Class (xxxx) was not found in L/S Department (xx) . Since retail classes are department specific, if you prompt (click on the arrow) in this field before entering a long SKU department, an error message indicates: L/S Department required to prompt on L/S Class. Retail classes are defined in and validated against the Retail Class table; see the Work with Retail Class Screen for more information.



Note:

When the *Use Retail Integration (H26)* system control value is *selected*, the system populates and validates against the Retail Class table instead of the Long SKU Class table; therefore, you cannot access [Working with Long SKU Classes \(WLSC\)](#).

Secured Feature

If you do not have authority to the *Maintain Long SKU Values in MITM (B05)* secured feature, you cannot enter or change this value.

Numeric, 4 positions; optional.

L/S vendor (Long SKU vendor)

A user-defined field that you can use for tracking and queries. If you defined a L/S vendor for the base item it defaults here, but you can override it. Long SKU vendors are defined in the SKU table, but are not validated.

Secured Feature

If you do not have authority to the *Maintain Long SKU Values in MITM (B05)* secured feature, you cannot enter or change this value.

Alphanumeric, 7 positions; optional.

Field	Description
L/S style (Long SKU style)	A user-defined field that you can use for tracking and queries. If you defined a L/S style for the base item it defaults here, but you can override it. Long SKU styles are defined the SKU table, but are not validated. Required if the Require L/S Style (I94) system control value is <i>selected</i>. In addition, the system validates that the value you enter is not assigned to another item/SKU. Secured Feature If you do not have authority to the <i>Maintain Long SKU Values in MITM (B05)</i> secured feature, you cannot enter or change this value. Alphanumeric, 20 positions; optional.
L/S color (Long SKU color)	A code, typically used in a retail environment, that represents the color portion of the Long SKU code. Used for reporting purposes. If you do not have authority to the <i>Maintain Long SKU Values in MITM (B05)</i> secured feature, you cannot enter or change this value. Numeric, 5 positions; optional.
L/S size (Long SKU size)	A code, typically used in a retail environment, that represents the size portion of the Long SKU code. Used for reporting purposes. If you do not have authority to the <i>Maintain Long SKU Values in MITM (B05)</i> secured feature, you cannot enter or change this value. Numeric, 5 positions; optional.
L/S width (Long SKU width)	A code, typically used in a retail environment, that represents the width portion of the Long SKU code. Used for reporting purposes. If you do not have authority to the <i>Maintain Long SKU Values in MITM (B05)</i> secured feature, you cannot enter or change this value. Numeric, 5 positions; optional.
L/S Subclass	A user-defined field that you can use for tracking and queries. Long SKU subclass can also be defined in the SKU table but is not validated. Displayed only if the <i>Use Retail Integration (H26)</i> system control value is selected. Secured Feature If you do not have authority under the <i>Maintain Long SKU Values in MITM (B05)</i> secured feature, you can not enter or change this value. Numeric, 4 positions; optional.
Carton	The type of carton in which this item must ship. If a carton ID exists, the system passes this information to TanData when confirming the item for shipment. This information is used to calculate best way shipping, which determines the lowest price to ship the carton. Numeric, 2 positions; optional.
Height	The height measurement for an item/SKU. The Height, Length, and Width values are used to determine the cubic volume of an item/SKU. You can enter the height in feet or centimeters, or any other measurement as long as it is consistent. Used in Suggest Location Placement (MSLO) when evaluating whether an item/SKU can be stored in a particular location. Numeric, 3 positions; optional.

Field	Description
Length	The length measurement for an item/SKU. The Height, Length, and Width values are used to determine the cubic volume of an item/SKU. You can enter this value in feet or centimeters, or any other measurement as long as it is consistent. <i>Suggest Location Placement (MSLO)</i> uses this value when evaluating whether an item can be stored in a particular location. Numeric, 5 positions; optional.
Width	The width measurement for an item/SKU. The Height, Length, and Width values are used to determine the cubic volume of an item/SKU. You can enter this value in feet or centimeters, or any other measurement as long as it is consistent. <i>Suggest Location Placement (MSLO)</i> uses this value when evaluating whether an item can be stored in a particular location. Numeric, 5 positions; optional.
Ship weight	The actual shipping weight of the item/SKU. The system may use this value to calculate carton weights and to determine your shipping charges if you perform manual confirmation and use cubing. The system uses the shipping weight of an item to create item weight records in the Download Extended Manifest table (<i>FLMNDE</i>) when you use a PC Manifest system to confirm shipments. Numeric, 7 positions with a 3-place decimal; optional.
Sell weight	The system uses this value to calculate the freight charge on a SKU when the <i>Freight method</i> on the order is set to <i>By Item</i> or <i>Flat Rt/Item</i>. Overrides the selling weight, if any, defined at the base item level. Numeric, 7 positions with a 3-place decimal; optional.
Last purchase cost	The cost of the item from the most recent purchase order, including any discounts, surcharges, or additional charges. The system uses this cost to determine the unit price for a purchase order if there is no vendor item price. Numeric, 13 positions with a 4-place decimal; optional.
Cube factor	The cubic volume of the SKU, which overrides the cubic volume defined at the base item level. Controls the number of units of this item that can fit into a carton. The system compares the cube factor against the Cube field from the System Control table, which defines a default box size. See Setting Up Fulfillment Values. <i>Example:</i> If the Cube field value in the System Control table is 100 and the Cube factor for an item is 25, then 4 of this item can fit into one box. The Cube Factor determines the number of picks required to ship an order. Numeric, 3 positions; optional.
Unit/measure	A standard by which an item/SKU is sold. Typical units of measure include: • <i>EA</i> = each • <i>IN</i> = inches • <i>C12</i> = case of 12 Validated against the Unit of Measure table (see Working with Units of Measure (WUOM)) and will default from the Default Item Unit of Measure (B33) system control value, if a value is specified. Alphanumeric, 3 positions; optional.

Field	Description
Status	A code that represents a SKU's status, such as obsolete, discontinued, sold out, etc. This information is used for inventory reporting purposes only. The status defined at the SKU level overrides the status defined at the base item level; however, even if the status matches the Item Status for Suppressing Item During Item Selection (L21) , the SKU-level status does not prevent the Item Selection screen from displaying the item. See Working with Item Status (WIST) . Alphanumeric, 1 position; optional.

Screen Option	Procedure
Return to the Create SKU 1 of 2 (With Overrides) Screen	Press <i>Page Up</i> .
Advance to a menu option related to item maintenance	Select <i>Supporting Files</i> to advance to the Item Support File Maintenance window. Options at this window are: • <i>Buyer</i>; see Working with Buyers (WBUY) • <i>Vendor</i>; see Working with Vendors (WVEN) • <i>Hazard</i>; see Working with Hazardous Item Codes (WHAZ) • <i>Item Category</i>; see Working with Item Category Codes (WITG) • <i>Item Class</i>; see Working with Item Classes (WICL) • <i>Item SKU Group</i>; see Working with SKU Groups (WISG) • <i>Item Status</i>; see Working with Item Status (WIST) • <i>Location Class</i>; see Creating and Maintaining Location Classes (WLCL) • <i>Long SKU Class</i>; see Working with Long SKU Classes (WLSC) • <i>Long SKU Department</i>; see Working with Long SKU Departments (WLSD) • <i>Ship Via</i>; see Working with Ship Via Codes (WVIA) • <i>Offer</i>; see Working with Offers (WOFR) • <i>Unit Of Measure</i>; see Working with Units of Measure (WUOM) • <i>Keyword</i>; see Working with Item Keywords (WKEY)
Display SKU offer information	Select <i>Offers</i> to advance to the Work with SKU Offers Screen .
Display base item information	Select <i>Item base info</i> to advance to the Display Base Item Information Pop-up window. See Create Item (Base Information) Screen for field descriptions.
Display comments	Select <i>Comments</i> to advance to the Display SKU Comments screen. See Work with Item/SKU Comments Screen for field descriptions.

Create SKU Offer Screen

Purpose: Use this screen to assign an offer to a SKU.

How to display this screen: Select *Create* at the [Work with SKU Offers Screen](#).

Field	Description
Offer (Offer code)	The code for the offer (catalog) in which the item/SKU appears. Validated against the Offer table. See Working with Offers (WOFR) . Alphanumeric, 3 positions; required (if other information is entered).

Field	Description
Effective date	The date the price becomes valid. This date should be on or after the start date of the offer, and on or before the stop date of the offer. The Effective date and Price are stored in the SKU Price table rather than the SKU Offer table. If you do not specify an Effective date and Price when you create a SKU Offer record, the system automatically creates a SKU Price record using the single-unit price from the Item Price table with the latest Effective date. If the latest Effective date from the Item Offer table is in the future, then the SKU Price record also has this future Effective date. Numeric, 6 positions (in user date format); optional.
Price	The price at which the SKU will sell in this offer if no discounts are applied, and the order date is on or after the Effective date. If you leave this field blank, the single-unit offer price with the latest Effective date defaults. You can specify multiple Effective dates and prices for an item or SKU in an offer. See Work with Item Prices Screen (Quantity Price Breaks by Offer). Numeric, 13 positions with a 2-place decimal; optional.
Associate price	The price at which the item/SKU will be sold in this offer to associate customers. Associate price is used when the Associate field on the order is selected (yes) and the order date is on or after the effective date. Numeric, 13 positions with a 2-place decimal; optional.
Tax inclusive price	The price at which the item will be sold in this offer on orders subject to VAT. In tax-inclusive pricing, a "hidden tax" is included in the order detail line for the item rather than accumulating in the Tax bucket. Included only if the <i>Tax Included in Price (E70)</i> system control value is selected. Numeric, 13 positions with a 2-place decimal; optional.
Tax incl assoc price (Tax-inclusive associate price)	The price at which the item will be sold to associate customers on orders subject to VAT. In tax-inclusive pricing, a "hidden tax" is included in the order detail line for the item rather than accumulating in the Tax bucket. Included only if the <i>Tax Included in Price (E70)</i> system control value is selected. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Special handling	Indicates whether this SKU is eligible for any type of special handling in this offer (such as monogramming, hemming, etc.). <i>selected</i> = This SKU is eligible for special handling. <i>unselected</i> = This SKU is not eligible for special handling. If this field is selected and there is a default special handling code defined (see below), <i>OR</i> if you specify special handling for a SKU in order entry, you advance to the Work with Special Handling Screen or the Work with Custom Special Handling Screen; however, if the special handling code's: Suppress S/H window field is selected: the system adds the special handling code and charge to the SKU without displaying the special handling screen. Bypass S/H field is selected: you do not advance automatically to the special handling screen unless you enter the special handling code when entering the SKU; however, you can still advance to the special handling screen by selecting <i>Special Handling</i> for the SKU. See Special Handling Overview for more information.
S/H price (Special handling price)	The price to charge the customer for special handling. You can specify in the <i>Evaluate Special Handling Charges by Order Line (D67)</i> system control value whether to add the price just once for each order line, or multiply the special handling price by the item quantity for the line. An error message similar to the following indicates that you defined a special handling price and the Special handling field is unselected: Special handling price not allowed when not eligible. If you specify a price here for a custom special handling code, it overrides any pricing defined for the custom special handling format; see Establishing Custom Special Handling Formats (WSHF). Numeric, 13 positions with a 2-place decimal; optional.
S/H code (Special handling code)	The additional charge code associated with the type of special handling you are offering for the SKU. The system validates that the additional charge code has a special handling Type of standard or custom; the system handles each type in a different way. See Special Handling Overview for more information. If you enter a special handling code here, you will advance to the Work with Special Handling Screen or Work with Custom Special Handling Screen automatically in order entry; however, if the special handling code's: Suppress S/H window field is selected: the system adds the special handling code and charge to the SKU without displaying the special handling screen. Bypass S/H field is selected: you do not advance automatically to the special handling screen unless you enter the special handling code when entering the SKU; however, you can still advance to the special handling screen by selecting <i>Special Handling</i> for the SKU. See Special Handling Overview for more information. Alphanumeric, 2 positions; optional.

Field	Description
Gift wrap	Indicates whether this SKU is eligible for gift wrap. If the <i>Gift Wrap Default (F07)</i> system control value is selected, this field defaults to selected, although you can override it; otherwise, this field defaults to unselected. <i>selected</i> = The item/SKU can be gift wrapped. <i>unselected</i> = In this offer, the item/SKU cannot be gift wrapped.
G/W price (Gift wrap price)	The price for gift wrapping the item. The G/W field must be selected. The gift wrap price will be charged for each unit of this SKU that is gift wrapped. Numeric, 13 positions with a 2-place decimal; optional.
Freight	The freight amount to be charged for this item/SKU. Multiplied by the quantity ordered to determine the freight charge for this item. Used only if the <i>Freight method</i> field for the Source Code table is set to <i>By Item</i> or <i>Flat Rt/Item</i>. Numeric, 13 positions with a 2-place decimal; optional.
Hidden freight	Used only with item/SKU level freight methods, such as: Flat rate by item, flat rate by item quantity, flat rate by item source, and by item. Hidden freight represents the portion of the item's catalog price that is used for freight. You might define a hidden freight value when the freight charge to ship the item/SKU is very high. The hidden freight charge is included in the price of the item/SKU so the actual freight charge is not visible to the customer. Hidden freight is also known as “theoretical” or “buried” freight. Numeric, 13 positions with a 2-place decimal; optional.
Sale item	Indicates whether the item is on sale. Valid values are: <i>selected</i> = This is a sale item. <i>unselected</i> (default) = This is not a sale item. If the <i>Exclude Sale Item When Prorating Discounts (I65)</i> system control value is selected, this flag controls whether the item is included in prorated discounts or when determining whether an order qualifies for a promotion. See the system control value for more information.
Volume discount	Indicates whether this item is eligible for an end-of-order discount that will be applied when you accept the order during Order Entry. <i>selected</i> = The item/SKU is eligible for the volume discount. <i>unselected</i> = The item/SKU is not eligible for the volume discount. See <i>Item Volume Discounting</i>
Coupon discount \$	Represents the amount that is subtracted from the price when the SKU is ordered from this offer. Numeric, 13 positions with a 2-place decimal; optional.
Coupon expiration date	The date the coupon is effective until (i.e., the date it expires). Numeric, 6 positions (in user date format); optional.

Field	Description
Feature/option	Indicates whether the item is considered a featured or optional item in a depiction. A depiction is a photograph or drawing of several items within an offer. The featured item is the focus of the depiction; whereas, the optional items are less prominently displayed. For example, if a dining room is depicted, the dining room set may be the featured item and the individual place settings, crystal, and centerpiece may be the optional items. Valid values are: <i>Feature</i> = Item is the featured item in the depiction <i>Option</i> = Item is an optional item in the depiction Optional.
Column pricing	Determines whether this item/SKU is eligible for column pricing discounts. <i>selected</i> = The item/SKU is eligible for column pricing discounts. You will advance to an additional screen where you may define the effective date, quantity, price, associate price, and pricing column. <i>unselected</i> = The item is not eligible for column pricing discounts. <i>What is column pricing?</i> In the Customer table, you may assign a customer to a pricing column. This means that the customer will be charged the column price, even if the customer does not order the number of units specified for the price break. If the customer orders more units than specified in the column assignment, the price break at the next level will be used on the order. <i>Example:</i> <pre>Quantity Price Assoc. Price Column 1 \$100.00 \$95.50 01 5 \$ 90.00 \$85.50 02 10 \$ 80.00 \$75.95 03</pre>
Pickup/new	Indicates whether the item has been carried over from a previous offer or is new to your product offerings. Valid values are: <i>Pickup</i> = Item is a pickup item, previously sold in an offer <i>New</i> = Item is a new addition to your offer Optional.
Warranty	Defines whether the item/SKU in this offer is a warranty item. Valid values are: <i>selected</i> = The item/SKU in this offer is a warranty item. When an operator adds this item/SKU to an order in order entry or order maintenance, the system adds the item to the order at no charge. <i>unselected</i> = The item/SKU in this offer is not a warranty item. If the <i>Default Price Override Reason for Warranty Items (G01)</i> system control value contains a price override reason code, the system defaults this code to the Price override code field, otherwise the operator must enter a code.

Field	Description
Required reason code	Defines whether an Order addition reason code is required when the item in this offer is added to an order in order entry or order maintenance. When you specify an add reason code for an item, there is a record of the add reason code stored in an order line history record, available for review at the Display Order Line History Screen. Valid values are: selected = The item in this offer requires an add reason code when the item is added to an order in order entry or order maintenance. The Enter Add Reason Window opens when an operator adds this item to an order in order entry or order maintenance. unselected = The item in this offer does not require an add reason code when the item is added to an order in order entry or order maintenance.

 Note:

When the item is added automatically to an order through the order API, the add reason code is not required. For example, an item might be added to an order automatically if it is set up as a free gift by source code.

Item Volume Discounting

How volume discounting works: If the Volume discount field is *selected* at the [Create Item Offer Screen](#), [Create SKU Offer Screen](#), or another screen that allows you to set up an item/offer or SKU/offer, and if the [Item Volume Discount \(B29\)](#) system control value is selected, the system will:

- total the number of units ordered of volume- discountable items
- check the quantity break price table in the SKU/offer for the discount price for each discountable item

For example, the system calculates the volume discount for items A123 and C123, as if the customer purchased 12 units of each item.

Item	Order qty	Volume discount	Regular price/unit	Merchandise total (regular price)	Volume discount price/unit	Merchandise total (with volume discount)
A123	* 4	Y	\$10.00	\$40.00	\$7.00	\$28.00
B123	6	N	\$5.00	\$30.00	N/A	\$30.00
C123	* 8	Y	\$20.00	\$160.00	\$15.00	\$120.00
Total:	Total:	Total:	Total:	\$230.00	Total:	\$178.00

Working with Existing Items (MITM)

Purpose: An item is a unit of inventory that is defined to the system according to item codes. The item code consists of 12 alphanumeric characters, and optionally, a three 4-position alphanumeric SKUs which allow you to further define the item by characteristics such as color, size, etc.

After defining your items, you can use the item number to access an item directly, or you can enter the description, department, buyer, class, and/or vendor to obtain a list of items that closely match your entry.

Before you can locate an item or display item information, you must create the item information on the system. You can create items by selecting *Create* at the [Select Items Screen](#). See [Creating Items Screen Flow](#) for more information on the screens the system automatically displays, depending on whether you are creating a non-SKU'ed or SKU'ed item.

Item image: When you move your mouse over each item code, the screen displays the item image if you have set one up. See [Setting Up Item Images](#) for more information.

Work with Items Screen

Purpose: Use this screen to create, change, delete, display or work with items.

How to display this screen: Select *OK* at the [Select Items Screen](#).

Field	Description
Item	A code representing a unit of inventory. Alphanumeric, 12 positions; optional.
Description	The description of the item. Alphanumeric, 120 positions; optional.
Class	A class code is a grouping of similar items. See Working with Item Classes (WICL) . Alphanumeric, 3 positions; optional.
Dept (Department)	The department to which the item belongs. See Working with Long SKU Departments (WLS D) . Numeric, 4 positions; optional.
SKU	Defines whether the item contains SKUs. • NO = The item is not a SKUed item. • YES = The item is a SKUed item.

Screen Option	Procedure
Create a new item	Select <i>Create</i> to advance to the Create Item Screen .
Change item information	Select <i>Change</i> for an item to advance to the Change Item screen. See the Create Item Screen for field descriptions.

Screen Option	Procedure
Delete item information	Select <i>Delete</i> for an item to delete it.
	 Note: If you try to delete an item with SKUs, you must delete SKU records and change the SKUs Y/N flag to <i>N</i> before deleting the item. If you try to delete without performing these tasks, the system displays the message: Cannot delete, SKUs allowed flag is Yes.  Note: You cannot delete an item if there are open orders or on-hand quantity for the item.
Display item information	Select <i>Display</i> for an item to advance to the Display Item screen. See the <i>Create Item Screen</i> for field descriptions.
Comments	Select <i>Comments</i> for an item to display the Work with Item/SKU Comments Screen .
Item Coordinates	Select <i>Coordinates</i> for an item to advance to the Work with Item Coordinates Screen .
Copy item information from one item to a new item in the same company.	Select <i>Copy</i> for an item to advance to the Copy Item Window .
Add, change, or delete item information, for an item with the same item number as the copied item, in one or more shared companies	Select <i>Copy to Company</i> for an item to advance to the Copy Item to Company Window . An error message indicates if you do not have authority to the Copy Item to Company Security (B15) secured feature: Not authorized to Copy. An error message indicates if shared companies do not exist for the current company: Shared companies do not exist for the parent. You can define shared companies for a company in Working with Companies (WCMP) .
Country/State Restriction	Select <i>Ctry/St Restr</i> for an item to advance to the Work with Item Restriction by Country/State Screen .
Finished goods	Select <i>Finished Goods</i> for an item to display the Work with Finished Good Component Items Screen .

Screen Option	Procedure
External Image and Information Link	Select <i>Image/Info Link</i> for an item to advance to the Item Image/Info Link Screen .
 Note: This option is available only if the Use External Item Image (L55) system control value is selected.	
Item Keywords	Select <i>Keywords</i> for an item to advance to the First Work with Keywords for Item Screen .
Offers	Select <i>Offers</i> for an item to advance to the Work with Item Offers Screen .
Sets	Select <i>Sets</i> for an item to display the Work with Set Component Items Screen .
Item ship via overrides	Select <i>Ship Via Override</i> for an item to advance to the Select Ship Via for Override Screen .
SKUs	Select <i>SKU</i> for a SKUed item to advance to the Work with SKUs Screen .
SKU Generator	Select <i>SKU Generator</i> for an item to advance to the SKU Generator Screen (Entering SKU Information) .
Source Prices	Select <i>Source Prices</i> for an item to display the Work with Special Source Price Screen .
UPC codes	Select <i>UPC</i> for a non-SKUed item to advance to the Work with UPC Codes Screen . You can work with UPC codes for a SKUed item by selecting <i>SKU</i> for the item and selecting the UPC option from the Work with SKUs Screen .
Work with user defined fields	Select <i>User Fields</i> for an item to advance to the Work with User Fields Screen .
Variable Sets	Select <i>Variable Sets</i> for an item to display the Work with a Variable Set Groups Screen .
Vendor Item	Select <i>Vendor Item</i> for an item to advance to the Work with Vendor Item Screen .
Warehouse	Select <i>Warehouse</i> for an item to display the Work with Item Warehouse Screen .
Maintain supporting files	Select <i>Supporting Files</i> .

Working with Item Ship Via Overrides

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

Each shipper that qualifies as an item ship via override is defined in the Item Ship Via Override table for the item.

- If the shipper qualifies as a ship via override for the item, the shipper can be used to deliver the item to its destination.
- If the shipper does not qualify as a ship via override for the item, the shipper cannot be used to deliver the item to its destination.

**Note:**

If records do not exist in the Item Ship Via Override table for an item, any valid, qualifying shipper in the Ship Via table can be used to deliver the item to its destination.

In this topic:

- [Item Ship Via Override Logic](#)
- [Select Ship Via for Override Screen](#)

Item Ship Via Override Logic

When you add an item to an order the system looks at the Item Ship Via Override table to determine if the ship via on the order header is an eligible shipper for the item; if the ship via on the order header is not an eligible shipper for the item, the system displays a [Ship Via Overrides for Item Window](#), requesting you to select an eligible shipper for the item on the order line. The system assigns the eligible shipper to the item on the order line; however, the system does not override the existing shipper on the order header.

Example: You enter an order containing items with records in the Item Ship Via Override table.

Ship via on order header: 3	Ship via on order header: 3	Ship via on order header: 3
Item	Ship via override	Results
AB101	ship vias 1 and 2	When you add item AB101 to the order, the Ship Via Overrides for Item window opens where you must select an eligible shipper (1 or 2) for the item before adding the order line to the order.
BC202	ship vias 1 and 3	When you add item BC202 to the order, the system does not assign a ship via to the order line and instead uses the default ship via on the order header (ship via 3) as the shipper.
CD303	ship vias 1 and 2	When you add item CD303 to the order, the Ship Via Overrides for Item window opens where you must select an eligible shipper (1 or 2) for the item before adding the order line to the order.
DE404	no ship via overrides defined	When you add item DE404 to the order, the system does not assign a ship via to the order line and instead uses the ship via on the order header (ship via 3) as the shipper.

When does the item ship via override take place? The system evaluates the shipper assigned to ship the item to its destination in the following places.

Function	Validation Takes Place When
Order entry and maintenance	You select <i>OK</i> to add the item to the order. You select <i>OK</i> to accept any changes you made to the order line at the Work with Order Line Screen (Changing/Adding an Item). You select <i>Accept</i> or <i>Add Recipient</i> to accept the order if the order is eligible for other ship via overrides or you have changed the ship via on the order header since adding the item to the order.
Batch order entry	You select <i>OK</i> to add the item to the order. You select <i>OK</i> to accept any changes you made to the order line at the Work with Order Line screen. You select <i>Accept</i> or <i>Add Recipient</i> to accept the order if the order is eligible for other ship via overrides or you have changed the ship via on the order header since adding the item to the order.
Generic order processing	The Order Processor job processes the incoming order. If the ship via for an item on the incoming order is not eligible to ship the item, the order is placed in an error status and must be corrected in batch order entry. See <i>Generic Order Interface (Order API)</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).



Note:

The system does not evaluate the ship via for items on a customer membership. However, if you go into order maintenance for that customer membership, the system will then evaluate the ship via for the items on the order.

What items are evaluated? The system evaluates every item added to an order to determine if records exist in the Item Ship Via Override table for the item, regardless of whether the item is backordered, soldout, added as a free gift, etc.

If the ship via assigned to the item is not eligible, the system displays the [Ship Via Overrides for Item Window](#), requiring you to select an eligible shipper.



Note:

If you use the [Process Substitute Items Screen](#) to replace an open, unreserved item on the order with another item, the system does not validate that the ship via on the order is eligible to ship the new item; you must go into order maintenance to validate the shipper assigned to the new item.

What if you override the ship via on the order header? If you override the ship via on the order header, the system reevaluates each order line whose Ship via field is blank to determine if the new ship via on the order header is eligible to ship the item. If the new ship via on the order header is not eligible, the system displays the [Ship Via Overrides for Item Window](#) for each item that cannot ship using the ship via on the order header, requiring you to select an eligible ship via for the item on the order line.

What if the item qualifies for more than one item ship via override? Each ship via that qualifies as an eligible shipper for the item displays in the *Ship Via Overrides for Item Window*, where you can select which shipper you wish to use to deliver the item to its destination. Any ship via that does not have a record in the Item Ship Via Override table for the item, does not display in the Ship Via Overrides for Item window.

What if you override the ship via on the order line? If you override the ship via on the order line, the system verifies that the ship via you define is eligible for the item, based on the records in the Item Ship Via Override table for the item. If the ship via you define does not exist in the Item Ship Via Override table for the item, the *Ship Via Overrides for Item Window* opens, requiring you to select an eligible ship via.

Valid SCF/Ship Via required: In order for the item ship via override to apply to an order line, the override ship via must already be set up with the SCF on the order shipping address as a valid SCF/ship via combination. If the SCF/ship via is not valid combination, the item ship via override will not apply to the order.

Downloading item ship via overrides to e-commerce: When you download items using the [Downloading E-Commerce Offer Files \(EOFR\)](#) menu option, if an item being downloaded has records in the Item Ship Via Override table, the system also downloads the item ship via override records to the EC Item Ship Via Override Download table.



Note:

The setting of the Download to e-commerce field defined for a ship via in the Ship Via table controls whether the ship via is eligible to download to e-commerce using the SCF/Ship Via download program; however, this field does not control the downloading of item ship via overrides.

Prompting on ship via: If records exist in the Item Ship Via Override table for an item, when you prompt on the Ship via field for an item, the system displays only those shippers that are eligible to ship the item. If you enter a ship via for an item that is not an item ship via override an error message indicates: *Invalid ship via for item*. If item ship via overrides do not exist for the item, you can define any valid ship via code in this field.

Are there other ship via overrides that might apply to the order? There are several other ways you can apply a ship via override to an order; however, item ship via overrides take precedence over any other ship via override. See [Ship Via Override Hierarchy](#) for information on the hierarchy in which the overrides take place.

Interaction Between Item Ship Via Overrides and Other Ship Via Overrides

How does this override relate to the item ship via override?

Item

If there is a Ship via specified for an item, the system defaults this ship via code to the order line.

However, if there are any records in the Item Ship Via Override table for the item, the system requires you to enter an eligible shipper in the Ship via field for the item in order entry. This way, only an eligible shipper defaults as the ship via on the order line.

Interaction Between Item Ship Via Overrides and Other Ship Via Overrides	How does this override relate to the item ship via override?
Promotion	If an order, or shipping address on an order, qualifies for a promotion with a ship via override, the system changes the ship via on the order header when you select <i>Accept</i> or select <i>Add Recipient</i> to accept the order. However, if the ship via override from the promotion is not a valid shipper for each item on the order that does not already have a ship via override, the system does <i>not</i> apply the ship via override from the promotion to the order. See Working with Promotions (WPRO) for more information on defining a ship via override for a promotion.
Zip/Ship Via	If the ship via on the order header allows auto-assignment of carrier (the ship via's Allow auto assignment field is selected) and a default ship via is defined for the postal code on the order, the system changes the ship via for the ship to customer to the default ship via for the postal code. However, if the zip ship via override is not a valid shipper for each item on the order that does not already have a ship via on the order line, the system still defaults the zip ship via override to the order header, but displays the Ship Via Overrides for Item Window for each item that requires a valid ship via, based on the Item Ship Via Override table. See Working with Zip/Ship Via (WZSV).
Best Way Ship Via	If you select a best way ship via from the Alternate Shipping Charges by Via Window in order entry, or the system assigns a best way ship via automatically, it changes the ship via on the order header to the best way ship via. See Working with Best Way Ship Vias for more information. However, if the best way ship via is not a valid shipper for each item on the order that does not already have a ship via assigned, the system still defaults the best way ship via to the order header, but displays the Ship Via Overrides for Item Window for each item that requires a valid ship via, based on the Item Ship Via Override table.
Offer Ship Via	If an order, or shipping address on an order, qualifies for an offer ship via override, the system changes the ship via on the order header when you select <i>Accept</i> or <i>Add Recipient</i> to accept the order. However, if the offer ship via override is not a valid shipper for each item on an order line whose Ship via field is blank, the system does <i>not</i> apply the offer ship via override to the order. If you add an item after the offer ship via override has been assigned to the order and the offer ship via override is not eligible for that item, the system displays the Ship Via Overrides for Item Window, requiring you to select an eligible shipper for the item. See Working with Offer Ship Via Assignment (WSVA).

Interaction Between Item Ship Via Overrides and Other Ship Via Overrides	How does this override relate to the item ship via override?
SCF Preferred Ship Via	If a Preferred ship via is defined for the SCF and the Allow auto assignment field for the ship via is selected, the system updates the Ship via on the order header to the preferred ship via. However, if the preferred ship via for the SCF is not a valid shipper for each item on the order that does not already have a ship via assignment, the system still defaults the preferred ship via to the order header, but displays the Ship Via Overrides for Item Window for each item that requires a valid ship via, based on the Item Ship Via Override table. See Working with SCF Codes (WSCF).

Item ship via overrides during pick slip generation: If the ship via for the pick slip is not a valid shipper for the item, based on the Item Ship Via Override table, the system continues to print the pick slip.

Additionally, if you define a ship via override during pick slip generation and the ship via override is not a valid shipper for all of the items on the pick slip, the system continues to print the pick slip using the ship via override.

Select Ship Via for Override Screen

Use this screen to review the ship via overrides eligible for an item. You can select which ship vias can be used to ship the item to its destination. All ship vias defined in the Ship Via table display on this screen.

The Selected field indicates if the shipper qualifies as a ship via override for the item. When you first advance to this screen, all ship vias are unselected.

- If the Selected field is *selected*, the shipper qualifies as a ship via override for the item and can be used to deliver the item to its destination. The system creates a record in the Item Ship Via Override table for the item and ship via combination.
- If the Selected field is *unselected*, the shipper does not qualify as a ship via override for the item and cannot be used to deliver the item to its destination.
- If the Selected field is *unselected* for all ship vias that display on the screen, you have not defined any ship via overrides for the item and all shippers are eligible to deliver the item to its destination.

How to display this screen: Select *Ship Via Override* for an item at the Work with Items screen and select *OK*.

Field	Description
Item	The code and description of the item for which you wish to define ship via overrides. Item code: Alphanumeric, 12 positions; display-only. Item description: Alphanumeric, 120 positions; display-only.
Code	The code for a shipper you can select as a ship via override for the item. Ship via codes are defined in and validated against the Ship Via table. Numeric, 2 positions; optional.

Field	Description
Description	A description of the shipper. Alphanumeric, 30 positions; optional.
Via pty (Ship via priority)	A value assigned to the shipper that controls how the system allocates inventory to backorders or reserves inventory during Batch Reservation. Valid values are 0 - 9, where 0 is the lowest priority and 9 is the highest priority. Numeric, 1 position; display-only.
Sel (Selected?)	Indicates if the shipper qualifies as a ship via override for the item. <i>Selected</i> = The shipper qualifies as a ship via override for the item; you can use this shipper to deliver the item to its destination. <i>Unselected</i> = The shipper does not qualify as a ship via override for the item; you cannot use this shipper to deliver the item to its destination.

 Note:

If this field is blank for all ship vias that display on this screen, you have not defined any ship via overrides for the item and all shippers are eligible to deliver the item to its destination.

Screen Option	Procedure
Select a shipper as a ship via override for the item; selected shippers can be used to deliver the item to its destination	<i>Select</i> the shipper. The system updates the Selected field to Y, indicating the shipper qualifies as a ship via override for the item.
Deselect a shipper as a ship via override for the item; unselected shippers cannot be used to deliver the item to its destination	<i>Deselect</i> the shipper. The system updates the Selected field to blank, indicating the shipper does not qualify as a ship via override for the item.
Select all shippers as ship via overrides for the item; any shipper can be used to deliver the item to its destination	Select <i>Select All</i> . The system selects the Selected flag for all shippers, indicating all shippers qualify as a ship via override for the item.

 Note:

The system creates a record in the Item Ship Via Override table for each ship via/item combination.

Screen Option	Procedure
Toggle to view all shippers or only view shippers that qualify as ship via overrides for the item	Select <i>Toggle All/Selected</i> . When you first advance to the screen, all shippers display.

Order Entry

- [Entering Orders](#)
- [Working with Error Order Batches](#)
- [Order Creation Errors](#)
- [Order Entry Appendices](#) (Integrations with AvaTax, Vertex, and Experian Data Quality (EDQ))

Entering Orders

Topic in this part: The following topics describe how to enter individual orders on the system as you receive them:

- [Introducing Order Entry](#) describes the process of entering orders on the system from a high-level point of view.
- [Setting Defaults in Order Entry](#) describes how to pre-define codes for several Order Entry fields.
- [Selecting Customers in Order Entry](#) describes how to select a customer for Order Entry.
- [Entering Orders](#) describes how to enter a complete order.
- [Working with Items on the Order](#) describes how to change, review or enhance information for items you have added to the order.
- [Upselling the Customer in Order Entry](#) describes several features available in the system that offer the customer discounts, incentive items, or free gifts, based on a quantity, item, source code, or offer on the order.
- [Expanding the Address in Order Entry](#) describes how to enter or verify additional address information that does not appear on the initial Order Entry screen.
- [Using a Permanent Shipping Address in Order Entry](#) describes how to specify a shipping address for the order that will be linked permanently to the customer who placed the order and may be used on future orders.
- [Assigning an Order Shipping Address](#) describes how to specify a shipping address for the order that will be linked to the current order only.
- [Adding a Recipient Order in Order Entry](#) describes how to enter the address to which the recipient or gift order will be shipped.
- [Assigning a Billing Address in Order Entry](#) describes how to specify a billing address for an order.
- [Defining Order Properties](#) describes several fields that are not available on the initial Order Entry screen that allow you to further define the order.
- [Adding Order Messages](#) describes how to add messages to the order for inquiry only or that may be printed on the invoice and/or pick slip.
- [Adding Miscellaneous Charges or Credits in Order Entry](#) describes how to add miscellaneous charges or credits to the order.

- [Displaying More Options in Order Entry](#) describes how to use options related to Order Entry that are not available on the Order Entry screens, including: Customer Action Notes, Customer Profile, Customer Messages, Void/Reprint Picks, and Order Totals (All Recipients).
- [Inquiring into Item Availability \(DIAV\)](#) describes how to select an item for the order prior to Order Entry, how to capture lost sales, review the current on-hand availability, review the quantity on-order with your suppliers, review the next expected delivery, review the quantities available at a given location in a warehouse, review the pending purchase order deliveries, and review important item information.
- [Entering User Fields](#) describes the Enter User Fields screen that may open automatically during Order Entry to capture any type of additional information about the customer.
- [Working with Order Summary Information](#) describes the Order Summary screen, which contains all items on the order and any recipient orders.
- [Posting a Return or Exchange Through Order Entry](#) describes the process of using Order Entry to enter a return or exchange if you do not have the original order on your system.
- [Entering Customer Memberships in Order Entry](#) describes how to create a customer membership by adding a membership item in order entry.
- [Entering Coupon Promotions on an Order](#) describes how to apply coupon discounts against an order or detail line.
- [Working with an Order-Level Email Address](#) describes how the system stores an email address specific to each order.
- [Valid Ship Vias for Window](#) describes the window you use to review all eligible ship vias for the order, including their overall shipping charges and expected delivery dates. Optionally, you can use this window to select a different ship via for the order.
- [Tracking Order/Call Disposition Activity](#) describes when the system captures order/call disposition activity.
- [Entering Pre-Order Quotes](#) describes how to create a pre-order for a customer listing the items the customer wishes to order and the order totals should the customer agree to place the order.
- [Customer Engagement Loyalty Integration](#) describes how to enroll sold to customers in the Oracle Retail Customer Engagement Loyalty program, review a customer's loyalty points and awards balances, accrue points from completed purchases, and redeem awards as a pro-rated merchandise discount on an order.

Introducing Order Entry

Purpose: This introductory topic describes different methods of entering an order, from straightforward Order Entry, in which you enter the most basic information to create an order, to full-fledged Order Entry, in which you may fine-tune order, item, or customer information.

In this topic:

- [What's Required?](#)
- [On Demand Reformatting](#)
 - [Scan Order Lines Screen](#)
 - [Work with Order Lines \(Adding a Line\)](#)

What's Required?

To complete an order you must define the customer placing the order, the customer receiving the merchandise, the merchandise being ordered, and how the customer is paying for the order.

Who is the customer?

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

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

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

See [Creating and Updating Customers](#) for more information on each type of customer.

What is the customer buying? This refers to the items purchased by the customer. Each item purchased represents an "order detail line."

How is the customer paying for the order? This refers to the method(s) by which the customer will pay for the order. The customer may pay by one or several payment methods (cash/check and/or credit card).

You can enter customer, item, and payment information at any point during the Order Entry process. For example, you can enter payment information:

- On the pop-up window for the payment type default
- On demand by selecting Payments to bring up the Payments screen
- On the Order Recap screen that opens automatically when you exit Order Entry (if defined in the System Control table)

You can select other functions during Order Entry to define the order further. For example, instead of entering an order in a straightforward fashion, you can select any of the functions at the bottom of the screen to add more information to the order.

Completing the order: Finally, you can take two different paths when you finish entering the order:

- Select **Accept** to accept the order if the information entered is accurate and valid
- Select **Reject** to reject the order if you make a keying error or if the customer cancels the order.

On Demand Reformatting

Purpose: Several commands are available during Order Entry that you can select at any point to use a different format, including:

- Scan order lines, which lists a single line of information for up to 8 items ordered.
- Add lines, which you use to add an item to the order and display additional fields to override standard information for the item.

Scan Order Lines Screen

Use this screen to display up to 8 lines on the order with a single line of information for each item. No item description or availability information is provided.

This format allows you to quickly review the items ordered. Select Next to review additional items on the order, as needed.

How to display this screen: Select Scan order lines at the [Work with Order Lines Screen \(Adding Items to the Order\)](#).

To return to the Work with Order Lines screen, select Detail. See the [Work with Order Lines Screen \(Adding Items to the Order\)](#) for descriptions of fields and additional options at the Scan Order Lines screen.

Work with Order Lines (Adding a Line)

Add item: Select Add line at the [Work with Order Lines Screen \(Adding Items to the Order\)](#) to use the Add a Line function. The [Work with Order Line Screen \(Changing/Adding an Item\)](#) opens for you to add an item to the order while overriding standard item information.

Override order defaults: The order detail line information you enter on this screen overrides the defaults established for the order on the [Work with Order Screen](#). For example, you can override:

- Freight
- Future Order
- Arrival Date
- Source
- Ship Via
- Warehouse

Override item defaults: Additionally, the information you enter in these fields overrides defaults established for the item:

- Ofr (offer)
- C/G (coordinate group)
- S/H Code (special handling code)
- S/H Charge (special handling charge)
- Affect Inv (affect inventory)
- Drop Ship
- Priority
- G/W (gift wrap)
- Bypass Rsv (bypass reservation)
- Cost Override

Totals fields: Finally, the totals fields at the bottom of the screen show the quantities reserved, canceled, and soldout for the current item.



Note:

The totals in the *Printed* (on pick slips), *Shipped*, and *Returned* fields are updated after the order is accepted and can be reviewed through Order Maintenance or standard or streamlined Order Inquiry.

Setting Defaults in Order Entry

Purpose: You can set defaults for several order entry fields on the [Default Values for Orders screen](#).

A default is a valid code (value) for a field that will be used for each new order, until you override it manually. You can predefine values for these fields used in order entry:

- order type
- payment type
- salesrep number
- ship via
- country

In this topic:

- [Default Values for Orders screen](#)
 - [Setting a Default Order Type](#)
 - [Setting a Default Payment Type](#)
 - [Setting a Default Salesrep Number](#)
 - [Setting a Default Ship Via](#)
 - [Setting a Default Country](#)

Why set defaults? One real advantage of defining defaults for these fields is that you will not have to reenter the same information for each new order that uses the same default. For example, if you are entering orders that will be delivered by Sample Shipping, you can enter the code for Sample Shipping in the *Ship via* field. All orders will be delivered by Sample Shipping until:

- You override the default in the *Ship via* field for an order.
- You reset the *Ship via* default to ship all orders by another shipper.

The defaults you set for order entry are used until you override them for an order or you specify different defaults on this screen.

What if defaults exist? The *Order type*, *Salesrep number*, *Ship via* and *Country* fields may already contain default codes when you first enter the Default Values for Orders screen if defaults have been predefined in system control values related to these fields.

The defaults you set on this screen override the values defined in the related system control values; however, order entry uses the *Order type*, *Salesrep number*, *Ship via* and *Country* defaults from the System Control table if you do not define defaults for these fields on the Default Values for Orders screen.

Default Values for Orders screen

Purpose: Use this screen to define defaults for fields used in order entry.

How to display this screen: Enter OEOM in the *Fast path* field at the top of a menu or select Enter/Maintain Orders from a menu.

Error order batches: Select the *Error order batches* field to switch the order entry mode to batch order entry. See [Working with Error Order Batches](#).

Setting a Default Order Type

You use the order type code to:

- Group orders on the system, for example, phone orders
- Trace how orders were received
- Monitor employee performance and accuracy
- Determine the sorting sequence of some reports
- Control the format of the order entry detail screen *when using Header format only*

You can create an order type for any category of orders, but some common order types are mail, phone, fax, retail, and e-commerce.

Effect on detail screen: The format of the order entry screen (*when using default Header format only*) can be line-by-line entry or full screen entry, based on the code in the *Order type* field.

Example: Phone orders use line-by-line entry because you need to process each line and provide immediate feedback to the customer. Alternatively, mail orders use full screen entry because you work directly off an order form and you need to enter order lines as quickly as possible.

You must enter an order type code sometime during order entry; however, you are not required to define a default order type.

For more information: See [Establishing Order Types \(WOTY\)](#) for more information on order types.

Setting a Default Payment Type

Payment types used on orders fall into these categories:

- Cash/Check (prepaid)
- Credit Card

When to define this default? You might want to define a default payment type for entering mail or fax orders if you sort these orders by payment method before entry.

You can also use the System Control table to define whether to default in the pay type used on the customer's previous order. You can define a particular pay type to default, or all pay types. If you use the System Control table to specify defaulting the previous pay type, and if the pay type is a credit card, the system will provide the customer's credit card number and expiration date as well. If you use the [Default Values for Orders screen](#) to define a default pay type, however, it will override any default pay type defined in the System Control table.

For more information: See [Working with Pay Types \(WPAY\)](#) for a complete discussion of payment types.

Setting a Default Salesrep Number

The salesrep number is a code for the person who is credited for making the sale on a new order. When you enter a sales representative number on an order, you link the order to this person for sales and commission reports.



Note:

The salesrep number can be different from the person who entered the order in order entry.

You can enter a salesrep number during order entry; however, a salesrep number can default from:

- the Customer Sold-to record
- the value defined in the [Default Salesrep Number \(E86\)](#) system control value

If you prompt on the *Salesrep#* field, the system displays the Select Salesrep window where you can review and select a valid salesrep. The window indicates whether the salesrep is active and if a home store has been assigned to the salesrep.

For more information: See [Working with Sales Representatives \(WSLS\)](#).

Setting a Default Ship Via

The ship via is a code that represents a carrier or service that will deliver the order. It is useful to define a default ship via when:

- The majority of your orders ship by one carrier, such as UPS.
- You are entering "rush" orders for a particular shipper, such as Federal Express.

You must enter a ship via code during order entry; however, you are not required to enter a default ship via.

For more information: See [Working with Ship Via Codes \(WVIA\)](#) for more information on ship via, including other situations when a ship via may default on an order.

Setting a Default Country

The country is a code for the country to which orders will be delivered. It is useful to define a default country if the majority of your orders ship to the same country.

You must enter a country code during order entry; however, you are not required to define a default country.

For more information: See [Setting Up the Country Table \(WCTY\)](#).

Screen Option	Procedure
Accept the defaults and advance to the Select Customer Sold To For Order Screen or the Customer Scan Screen	Select OK.
Switch to order maintenance so that you can update an existing order or quote	Select Maintain Orders. See Introducing Order Maintenance for standard order maintenance or Maintaining Quotes in Order Maintenance for quote maintenance.

Selecting Customers in Order Entry

Purpose: This topic describes how to select the customer to enter an order. You can find the customer by entering the customer number, scanning for the customer number, or selecting Create to add the customer record to the system.

This is the first step in entering a new order.

In this topic:

- [Select Customer Sold To For Order Screen](#)
- [Select Source Screen](#)
- [Entering a Customer Number](#)

- [Ghost Customer Number Warning Window](#)
- [Scan Types](#)
 - [How to Scan?](#)
 - [Using the Scan Screen](#)
 - [Carrying Forward Search Information](#)
- [Change Cust Sold to Name & Address Screen](#)
- [Creating a New Customer](#)
- [Customer Order History Window](#)
- [Customer Selection Screen](#)
- [Work with Customer Call Log Screen \(WCLL\)](#)
- [Log Telephone Call Screen \(Entering or Changing a Call\)](#)
- [Customer Scan Screen](#)

Select Customer Sold To For Order Screen

If using the Customer Selection screen: Use this screen to select a customer for order entry. This screen allows you to review customer and order information and advance to a number of additional functions. See [Customer Selection Screen](#).

You can select a customer from this screen by:

- entering a customer number
- scanning for a customer
- creating a customer during order entry

Customer Workflow Management window: The [Customer Workflow Management Window](#) automatically opens when you select a customer for order entry if open or in use ticklers exist for the sold to customer. Select Ticklers at this window to advance to the [Work with Ticklers Screen \(sold to customer view\)](#) where you can review and work with ticklers associated with the sold to customer.

How to display this screen: Select OK at the [Default Values for Orders screen](#), unless:

- If you are flagged as a *CTI user*, you advance instead to the [Customer Selection Screen](#).
- If the [ORCE Customer Integration \(L37\)](#) system control value is set to INTERACT, you advance instead to the [Customer Scan Screen](#).

Field	Description
Batch #	The number identifying the batch you are currently working with. Displayed only if you selected the <i>Error order batches</i> option at the Default Values for Orders screen . <i>Numeric, 5 positions; display-only.</i>

Field	Description
Source code	A code to identify a group of customers. Use source codes to define freight methods, track your marketing efforts, and for reporting. Included when? The source code field is included and enterable only if the Cross company scan field in the Company table is selected and you do not choose to scan from the Customer Selection Screen. If the field is included, you can scan into other companies that have the same setting in the Active company field in the Company table as your company. If you enter a source code When you enter a source code in this field and select <i>OK</i>, the system: • displays the description of the source code to the right of this field. • displays the code and description of the offer associated with the source code underneath this field. • defaults the source code to the order. To scan for a source code If you prompt on the <i>Source code</i> field, you advance to the Select Source Screen, where you can select a source code.

 Note:

If you select a source code that is defined in multiple Order Administration companies, the system returns you to the [Select Customer Sold To For Order Screen](#) or the [Customer Scan Screen](#) in the company with the lowest company number. For example, if source code A123 is defined in companies 7 and 12 and you select A123 from the Select Source screen, the system returns you to the Select Customer For Order screen in company 7.

If you receive calls from an external order call center

If you have enabled Order Administration to receive calls from an external order call center, the system defaults the source code associated with the call to this field. In addition, if the [Capture Order/Call Disposition \(K03\)](#) system control value is set to ALL, the system creates a record in the [Order Disposition Table](#) so that you can track order/call disposition activity; see [Tracking Order/Call Disposition Activity](#).

Code: Alphanumeric, 9 positions; optional.

Description: Alphanumeric, 30 positions; display-only.

Field	Description
Offer code and description (unlabeled field below <i>Source code</i>)	The code and description of the offer associated with the source code you entered in the <i>Source code</i> field. <i>Code: Alphanumeric, 3 positions; display-only.</i> <i>Description: Alphanumeric, 30 positions; display-only.</i>
Customer (Sold-to customer number)	A number assigned by the system to identify the customer. You advance immediately to the initial order entry screen to enter an order for this customer when you enter a valid customer number. See Entering a Customer Number. Ghost? If you enter the number of a Ghost customer, the Ghost Customer Number Warning Window, informs you that the customer number you entered has been merged with another customer number. <i>Numeric, 9 positions; optional.</i>
Match code	A code that the system assembles in the format you define through the Match Code function. The match code contains elements of the customer's name and address. The system assigns a match code to every customer on the system to identify duplicate customers and to detect fraudulent addresses. Enter a match code to advance to a scan screen that lists customers whose match codes follow your entry alphanumerically. Select the customer for order entry from the scan screen. See Scan Types. Two examples of match codes are: BILHINHER12345 CHRSWE22H02062 See dSetting Up Match Codes (MMCH). <i>Alphanumeric, 15 positions.</i>
Postal code	A postal delivery area. Enter a postal code/last name or postal code/company name combination to advance to a scan screen that lists customers whose postal codes/last names or postal codes/company names follow your entries alphanumerically. Select the customer for order entry from the scan screen. See Scan Types. Scan length: The Postal Code Scan Length (F61) system control value controls how many characters of the postal code to use when searching for a customer. See that system control value for a discussion. See dSetting Up the Zip/City/State (Postal Code) Table (WZIP). <i>Alphanumeric, 10 positions.</i>
Last name	The sold-to customer's last name. Enter a full or partial last name to advance to a scan screen that lists customers whose names follow your entry alphanumerically. Enter a full (not partial) last name and first name to advance to a scan screen that lists customers with last names and first names that follow your entry alphanumerically. Select the customer for order entry from the scan screen. See Scan Types. <i>Alphanumeric, 25 positions.</i>

Field	Description
First name	The sold-to customer's first name. Enter a last name, first name, and postal code to advance to a scan screen that lists customers by postal code, last name, and first name, positioned to the customer you entered. Select the customer for order entry from the scan screen. See Scan Types. You cannot scan on first name alone. <i>Alphanumeric, 25 positions.</i>
Company	The sold-to customer's company name. Enter a full or partial company name to advance to a scan screen that lists customers whose company names follow your entry alphanumerically. Select the customer for order entry from the scan screen. See Scan Types. <i>Alphanumeric, 30 positions.</i>
Telephone #	The daytime, evening, fax, or mobile telephone number of the sold-to customer. Enter a full or partial telephone number to advance to a scan screen that lists customers whose telephone numbers follow your entry alphanumerically. Select the customer for order entry from the scan screen. See Scan Types. You can define a telephone number format for each country to map to the phone numbers operators enter into the system. See Setting Up the Country Table (WCTY). <i>Alphanumeric, 14 positions.</i>
Alternate customer number	An additional number to identify the sold-to customer. This may be a customer number from another system. Field label: The field label on this screen is based on the name you enter in the Alternate Customer Number Label Description (H95) system control value; if you do not enter a name in this system control value, the field label is <i>Alt customer</i>. Example:
	 Note: Scanning by the alternate customer number of a ghost customer is not currently implemented if the Display Alternate Customer Cross Reference Window (I84) system control value is selected.
	Alternate customer number cross-reference: Enter an alternate customer number to advance to a subsequent scan screen that lists customers by alternate customer number. See Display Alternate Customer Cross Reference Window (I84) for more information. <i>Alphanumeric, 15 positions.</i>
Email Address	An email address for the customer. When you enter a full or partial email address, you advance to the Scan Customer by Email Address screen, where you can scan by any email address on file for a sold-to customer. Not case sensitive. See Scan Types. <i>Alphanumeric, 50 positions.</i>

Screen Option	Procedure
Change the default value for one or more order entry fields	Select Change Defaults. See Setting Defaults in Order Entry .
Enter an order or quote for a new customer	Select Create. See Entering Orders for standard order entry or Entering Pre-Order Quotes for quote entry.
Change an existing order or quote	Select Maintain. See Performing Order Maintenance for standard order maintenance or Maintaining Quotes in Order Maintenance for quote maintenance.
Inquire on an item's availability, use the notepad function to select items for a new order, or capture lost sales	Select Item Avail. See Display Item Availability Screen.
Exit the screen and return to the main menu	Select Exit. If the Capture Order/Call Disposition (K03) system control value is set to ALL, and you advanced to this screen from a call received from an external order call center, the system displays the Confirm Order/Call Disposition Window where you must enter the reason for exiting this screen instead of creating an order. In addition, the system creates a record in the Order Disposition Table ; see Tracking Order/Call Disposition Activity .

Select Source Screen

Purpose: If you are working in a company that has cross-company scanning enabled and you do not use the [Customer Selection Screen](#), you can scan into other companies that also have cross-company scanning enabled. You can scan only across companies that have the same setting in the *Active company* field in the Company table; this prevents you from inadvertently scanning from a test or training company to a “live” company, or vice versa. See [Working with Companies \(WCMP\)](#).

How to display this screen:

- enter a valid source code for a different, compatible company in the [Source code](#) field at the [Select Customer Sold To For Order Screen](#); the source code and description, associated offer, and description display, and the selected company name is listed at the top of the screen; or
- click on the arrow in the [Source code](#) field.



Note:

If the [Sort Source Codes Prompt by Description in Order Entry \(F67\)](#) system control value is selected, the system displays source codes alphanumerically by source code description instead of by source code.

Field	Description
Source	A code to define a group of customers. See Working with Source Codes (WSRC) . <i>Alphanumeric, 9 positions; optional.</i>

Field	Description
Description (Source code description)	The description associated with the source code. You cannot scan on this field. <i>Alphanumeric, 25 positions; display-only.</i>
Cmp (Company)	A code representing the company associated with the source code. <i>Numeric, 3 positions; optional.</i>
Ofr (Offer)	A code representing a catalog, advertisement, or other means of presenting merchandise to your customers. Each source code is associated with an offer. See Working with Offers (WOFR) . <i>Alphanumeric, 3 positions; optional.</i>
Description (Offer description)	The description associated with the offer. You cannot scan on this field. <i>Alphanumeric, 25 positions; display-only.</i>

Screen Option	Procedure
Select a source	Select a source code to return to the Select Customer Sold To For Order Screen in the company associated with the source code. For example, if you select source code A123 and it is a source code for company 7, the system returns you to the Select Customer Sold To For Order screen in company 7.

 Note:

If you select a source code that is defined in multiple Order Administration companies, you return to the Select Customer For Order screen in the company with the lowest company number. For example, if source code A123 is defined in companies 7 and 12 and you select A123 from the Select Source screen, you return to the Select Customer For Order screen in company 7.

Create a new source code	Select Create. See Working with Source Codes (WSRC) .

Entering a Customer Number

Purpose: Enter a customer number in the *Customer* field to select the customer placing the new order. Information on file for this customer is listed for the new order, but can be updated.

 Note:

The system updates customer information in the Customer table automatically when you change the customer's name or address during order entry.

Ghost Customer Number Warning Window

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

The ghost customer is the source customer in the merge; records for the source customer are merged with the records for a matching target customer; the system selects the most up-to-date information for target and source and saves these records in the target customer's record. When performing the merge you can elect to flag a source customer as a *Ghost* on the Working with Source Codes (WSRC). *Ghost* customer records are retained in the Customer Sold To table for informational purposes, but *Ghost* customers do not have order history, billing history, mail history or entity information, since all related history records are merged into the source (target customer) records.

When you enter the number of a ghost customer, the pop-up Warning Window opens.

Select Continue to advance to the order header screen with the target customer number entered on the order. For example, if you enter 202, a ghost customer, the system will display this window informing you that customer 202 has been merged into customer 137. When you continue with the order process, customer 137 will default on the [Work with Order screen](#).

See Working with Merge/Purge Sold-to Names (MMCS) for more information on the merge/purge function.

Scanning for a Customer Number

Purpose: Enter information in any of the scan fields on the Select Customer Sold To For Order screen to locate a customer for order entry if you do not know the customer number.

Scan Types

Purpose: Enter any combination of customer information in the scan fields. You advance to a scan screen that lists the customers who closely match the information you entered. Each of these subsequent scan screens (except the Scan Customer by Phone Number and Scan Customer by E-mail Address screens) includes the customer name or company name, customer number, street address, city, state and postal code.

Several types of scans are available for customer selection, including *Scan Customer by...*

- Match Code
- Postal Code/Last Name
- Postal Code/Last Name/First Name
- Postal Code/Company Name
- Last Name
- Last Name/First Name
- Company Name
- Phone Number
- Alternate Customer Number
- E-mail Address

How to Scan?

You can enter partial or full information into any of the scan fields. For example, you can enter J or JONES in the *Last name* field to locate Howard Jones. (The *First name* field must be used in conjunction with the *Last name* and *Postal code* fields; you cannot scan on first name alone, or on last name, first name.)

**Note:**

Be as specific as possible when you enter scan information because the resulting scan screen will list only those customers who match the scanning criteria.

After entering scanning information, you advance to a scan screen that lists customers who closely match the information entered. The customers are listed alphabetically or numerically from the first record that matches your scan information until the end of the table.

**Note:**

The *E-mail Address* scan field is not case sensitive; an email address of `abc@example.com` matches an entry of `ABC@EXAMPLE.COM`, and vice versa.

Alphabetic Scan: For example, you receive this type of scan if you enter `J` in the *Last name* field:

JAM

JANE

JONES (etc.)

However, you receive this type of scan if you enter `JONES` in the *Last name* field:

JONES

JONESBURY

JONESTOWN (etc.)

Numeric Scan: You receive this type of scan if you enter `0` in the *Postal code* field:

01519

01527

01560 (etc.)

However, you receive this type of scan if you enter `02062` in the *Postal code* field:

02062

02069

02074

E-mail Address Scan: You receive this type of scan if you enter `aaa` or `AAA` in the *E-mail Address* field:

aadams@example.com

bcominski@example.co

zyarrow@example.com

AAAcacat@example.com (etc.)

Using the Scan Screen

There are several ways to select a customer for order entry from the scan screen, depending on whether the customer is listed.

If the customer is listed: Enter a 1 next to the appropriate customer number to select the customer for order entry.

If you're not sure if this is the right customer: Select Display for a customer number to review additional information about the customer, such as telephone numbers. If the customer is correct, enter a 1 next to the customer number.

If the customer is not listed: There are two things you can do:

- Continue your search by scrolling through customer records (select Next). Additional customer records are available if a + appears in the lower right of the screen.
- Select Create to enter an order for a new customer. The system assigns a customer number to the new customer and captures the customer's name and address information in the Customer table under the new customer number.

Carrying Forward Search Information

When you select Create to create a new customer after you have scanned on postal code, company, last name, or any combination of these fields, the search information you had entered defaults onto the order header. This defaulting saves you keystrokes when you enter the information to create the new customer in your company.

For example, if you:

- enter a last name at the [Select Customer Sold To For Order Screen](#), and
- select Create at the Scan Customer by Last Name field

when you advance to the [Work with Order screen](#), the last name you entered will default into the appropriate field.

Similarly, if you:

- enter a postal code and company name at the [Select Customer Sold To For Order Screen](#), and
- select Create at the Scan Customer by Postal Code/Company screen

When you advance to the [Work with Order screen](#), the company name and postal code default into the appropriate fields. The city, state, and country associated with the postal code also default.



Note:

The most recent search information you have entered defaults onto the order header. If you enter additional or different information at a subsequent scan screen, this is the information that will default.

Change Cust Sold to Name & Address Screen

Purpose: Use this screen if you need to update the address.

How to display this screen: Select Change for the customer number at a scan screen, or select Customer Maintenance at the [Customer Selection Screen](#). You can update the customer's permanent name and address information on this screen. This is an easy way to update the customer record without exiting order entry.

**Note:**

The [Display/Update Bill to Screen](#) opens if the Sold-to customer is linked to a permanent Bill-to account and [Update Bill-to Address with Sold-to Address Changes \(E13\)](#) is selected in the System Control table. The screen enables you to update the changes made to the Sold-to address to the Bill-to address.

Field	Description
Customer #	A unique number to identify a customer. The system assigns a customer number automatically when you create a new Sold To Customer record. The system assigns the customer number whether or not you complete the customer record. <i>Numeric, 9 positions; display-only, assigned by the system.</i>
Name	The following 5 fields are available for you to enter the customer's full name: Prefix A title (such as "Mrs." or "Dr.") that precedes the customer's name. The prefix prints on labels and forms. <i>Alphanumeric, 3 positions; optional.</i> First Name The Sold-to customer's first name. <i>Alphanumeric, 15 positions; optional.</i> Initial The initial of the customer's middle name. <i>Alphanumeric, 1 position; optional.</i> Last Name The customer's last name. <i>Alphanumeric, 25 positions; required if company name is not present.</i> Suffix An addition to the customer's full name (such as "M.D.," "Fr.," or "III"). The suffix prints on labels and forms, but is not accessible to scans. <i>Alphanumeric, 3 positions, optional.</i>
Company	The name of the company associated with the customer placing the order. <i>Alphanumeric, 30 positions; required if last name is not present.</i>

Field	Description
Address	The customer's street address, plus three additional lines for the customer's delivery address. This is the primary delivery address. Shipping to a Post Office Box To ship to a Post Office Box, enter POST OFFICE BOX, POST BOX, or any variation of PO BOX (with or without spaces or non-alphabet characters, such as P.O. BOX), and the box number in the customer's street address. During order processing, the system validates that the carrier can ship to a post office box (as defined in the Ship Via table). Example: Enter P.O. Box 9999 in the <i>Street</i> field to indicate delivery to a post office box instead of a home or company address.

 Note:

If you type POST OFFICE BOX, POST BOX, or any variation of PO BOX in the customer's street address during order entry or through the Order API, the system automatically selects the *PO box* field for the customer. However, if you remove this text from the customer's street address, the system does not automatically deselect the *PO box* flag.

 Note:

When you create a customer outside of order processing, you need to select the *PO box* field manually.

Apt/suite	<i>Alphanumeric, 32 positions; required.</i> The apartment number or suite number associated with the customer's delivery address. Follow these steps to enter an apartment or suite address: • Type APT to indicate an apartment or STE to indicate a suite. • Insert a space and type the number of the apartment or suite, for example: APT 4 or STE 116. Addresses must conform to United States Parcel Service (USPS) address formatting field description standards. For example, always precede the apartment or suite number with the appropriate abbreviation (for example, APT or STE). <i>Alphanumeric, 10 positions; optional.</i>

Field	Description
Postal code	The postal or zip code for this customer. This code represents a delivery area. If a postal code is required for the country, it is validated against the Zip/City/State (Postal Code) table; see Setting Up the Zip/City/State (Postal Code) Table (WZIP).  Note: The system fills in the City and State fields appropriately if you set up the Postal Code/City/State table and you enter a valid postal code.
City	<i>Alphanumeric, 10 positions; required or optional based on country.</i> The city where the customer lives or receives mail or shipments. <i>Alphanumeric, 25 positions; required.</i>
St (State)	The state or province where the customer lives or receives mail or shipments. State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Required only if the <i>Require state?</i> flag is selected for the country. The system validates that the state you enter is assigned to the SCF for the postal code. <i>Alphanumeric, 2 positions; required or optional based on country.</i>
Ctry	The code for the customer's country. Country codes are defined in and validated against the Country table. The Default Country for Customer Address (B17), if any, from the System Control table defaults here when you create a new customer; however, you can override the default. <i>Alphanumeric, 3 positions; required.</i>

Field	Description
Delivery	Identifies a business (commercial) or residential address. Used to calculate shipping charges for shippers that use rate tables (such as U.P.S.). The Default Delivery Code for New Order Entry Customers (D13) system control value defaults here; however, you can override this default. Valid values: • Business = Business rate table determines shipping charges. • Residential = Residential rate table determines shipping charges. • No distinction = No distinction between business and residence.

 Note:

Only Business and Residential are valid values for U.P.S. The system defines the shipper on an order as U.P.S. if the *Type* field in the Ship Via table = U; see [Working with Ship Via Codes \(WVIA\)](#).

Required.

Field	Description
Class	A code that categorizes customers at a high level for reporting purposes. You can use customer class codes to: • send offers to a limited group of customers • restrict item sales to a group of customers • bypass normal item reservation (If the customer is assigned to a class flagged to bypass reservation, then the bypass setting applies even if the <i>Bypass reservation</i> setting for the customer is unselected) • determine whether to prompt for user-defined fields in order entry You can define a Default Customer Class in Order Entry (D63) to assign to all customers you create through order entry. Required? The Require Customer Class (H85) system control value defines whether this field is required. Secured? The Maintenance of Customer Class Field (B07) secured feature defines whether you can enter or maintain the customer class field at this screen.
	 Note: If the Require Customer Class in OE, WCAT, and WCST (H85) is selected and the customer does not have a customer class code assigned, a user who does not have authority based on the Maintenance of Customer Class Field (B07) secured feature cannot update a customer.
	See Setting Up the Customer Class Table (WCCL) on working with customer classes. <i>Alphanumeric, 2 positions; optional.</i>
Mail flag	Controls whether the customer receives future catalogs. Not to be confused with the three-position, alphanumeric Mail code field described above. This field is selected or N for new customers (added through order entry or a catalog request), depending on the value in the Default Mail Name (D10) system control value. Also defaults into the mail code on the first Create Customer Sold To screen, although you can override it. Valid values are: • selected = Mail catalogs to the customer • unselected = Do not mail catalogs to the customer
Rent flag	Controls whether to include the customer's name in lists you sell to other companies for their own catalog mailings. This field is selected or N for new customers (added through order entry or a catalog request), depending on the value in the Default Rent Name (D11) system control value. Valid values are: • selected = You can sell the customer's name to another company • unselected = Do not sell the customer's name to another company

Field	Description
Opt in/Opt out	Indicates the preferred method of correspondence for the primary email address. Valid values are: • O1 (Email) = Email is the preferred method of correspondence. • O2 (Order-only email) = Use email for order-related correspondence only; generate a document for other correspondence. • O3 (No email) = Do not use email for any correspondence; generate a document instead. • O4 (Do not ask the customer) = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified. For a new customer, this value defaults from the Default Opt In/Opt Out Flag (G97) system control value, but you can override the default.

 Note:

The above values use the letter O, not the number 0 (zero).

Email notifications: See [When Does the System Generate an Email Notification?](#) for an overview.

Outbound email API: The opt in/opt out settings controls the generation of the *Outbound Email XML Message (CWEmailOut)* using the same logic as the generation of outbound emails. See *Outbound Email API* for an overview.

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

Updating from an external system: See [Receiving Customer Email Status Updates From an External System](#) for an overview and the required setup.

Alphanumeric, 2 positions; required.

Mail code

This code specifies how often, and under what conditions, you send mail to the customer. You can use this code to indicate the customer's mail preferences with more precision than the *Mail* flag, discussed below, permits.

Mail codes are defined in and validated against the Mail/Call Code table. See [Working with Mail/Call Codes \(WMCC\)](#).

After you create a sold-to customer at this screen, the value in the *Mail* flag defaults into the mail code field if you have not entered a mail code. You must define this value (either Y or N) in the Mail/Call Code table or the screen displays an error message.

Alphanumeric, 3 positions; optional.

Field	Description
Call code	This code specifies how often, and under what conditions, you call the customer. Call codes are defined in and validated against the Mail/Call Code table. See Working with Mail/Call Codes (WMCC). <i>Alphanumeric, 3 positions; optional.</i>
Telephone	The phone numbers and extensions for the sold-to customer. The Third Phone Number Type (L53) system control value determines whether the third phone number is labeled the <i>Fax</i> or <i>Mobile</i> number. <i>Phone number: alphanumeric, 14 positions each field; display-only.</i> <i>Extension: alphanumeric, 4 positions; display-only.</i>
Pop Up Messages	Four optional message lines. Where do these messages display? These messages display on the: • Customer Selection Screen as one 80-position field.  Note: The system does not add or remove any spaces when displaying these messages as one 80-position field; enter the text as you wish it to display. For example: If a word ends at the end of a message, put a space at the beginning of the next message so that the next word is separated from the previous word. If a word splits between the end of one message and the beginning of the next message, do not add a space at the end of the first message or the beginning of the next message. • Display Pop Up Msgs For Window in order entry for this customer unless the customer advanced to the order from the Customer Selection Screen. Secured feature: The Access to Customer Pop-up Messages (A79) secured feature controls whether you can create or change a customer message. If this secured feature is set to *ALLOW, you can create or change a customer message. If this secured feature is set to *EXCLUDE, the message fields are display-only. <i>Alphanumeric, 20 positions each field; optional.</i>
Email address	The customer's primary email address. This address, like any other email addresses for the customer, is stored in the Customer Sold To Email table; in addition, the primary email address is also stored in the Customer Sold To table. The primary email address defaults in order entry. See Working with Customer Email Addresses for an overview. <i>Alphanumeric, 50 positions; display-only.</i>

Screen Option	Procedure
Work with customer notes	Select Customer Notes to advance to the Edit Customer Notes Screen .

Creating a New Customer

Purpose: Select Create at the [Select Customer Sold To For Order Screen](#) to enter a new order and add a new customer to the system at the same time. You can add a new customer at the [Work with Order screen](#) using the fields below. Notice that the customer name and address fields are blank on the order entry screen so that you can enter a new order, enter customer information, and create a customer record on the system at the same time.

If you had previously searched for a customer by scanning on postal code, company name, or customer name, this information defaults into the appropriate fields when you create a new customer. See [Entering Orders](#) for complete descriptions of each customer-related field.

Customer price group: If you do not assign a customer price group to a new customer, the system assigns the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value to the customer.

Customer Order History Window

Purpose: This window identifies a customer who should be given preferential treatment because of the dollar value of purchases made since the first order.

Pops up when? This window opens only for customers who have made purchases greater than the value in the \$ *Value* field defined for the *Customer LTD purchase dollars* threshold in the Threshold table.

You can verify this threshold through the Work with Thresholds function (fast path = WTHR). The *Customer LTD purchase dollars* record is identified by the threshold code of LP.

This threshold option is delivered with the system; you may set this value at any dollar amount.

This window opens when:

- You enter a customer number in the *Customer* field on the [Select Customer Sold To For Order Screen](#), or
- You *select* a customer record on a Customer Scan screen, and
- The total customer purchases are greater than the amount in the \$ *value* field for the *Customer LTD purchase dollars* threshold.

Field	Description
Customer# (Sold-to customer number)	A number assigned by the system to identify the customer who is placing the order. A record exists in the Customer Sold-to table under this number. <i>Numeric, 9 positions; display-only, assigned by the system.</i>

Field	Description
\$ orders LTD	The cumulative value of orders placed by this customer since the customer first placed an order on the system. This information accumulates in the Sold-to Customer History table. The system updates this value each time the customer places an order.

 Note:

This field does not include the dollar value associated with pre-order quotes; see [Entering Pre-Order Quotes](#) for an overview.

Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.

Completing this screen: You have selected the customer for order entry through the customer number, a customer scan, or by selecting Create. Now you are ready to enter the order. Continue with [Entering Orders](#) for more information.

Customer Selection Screen

Purpose: Use this screen to review a customer's address information and order history before entering or maintaining an order, or to advance to:

- standard order inquiry
- customer maintenance
- reviewing item availability
- customer notes
- operator statistics inquiry
- call log entry or inquiry

Actual CTI interface not necessary: It is not necessary to use actual computer telephony integration (CTI) to use this screen. You can simply use the screen as an alternative to the [Select Customer Sold To For Order Screen](#). See Use Computer Telephony Integration (F26) for more information on setting up telephony integration.

Customer Workflow Management window: The [Customer Workflow Management Window](#) automatically opens when you select a customer if open or in use ticklers exist for the sold to customer. Select Ticklers at this window to advance to the [Work with Ticklers Screen \(sold to customer view\)](#) where you can review and work with ticklers associated with the sold to customer.

How to display this screen: This screen opens automatically when you complete the [Default Values for Orders screen](#) if:

- the Use Computer Telephony Integration (F26) system control value is selected for any company on your system
- the *CTI user* field in Work with Users is selected
- the *CTI default screen* field in Work with Users is set to Always display CTI screen

Customer and order information: The top half of the screen displays information about the customer. All fields are display-only. If you need to change customer information, select Cust Maint to advance to the [Change Cust Sold to Name & Address Screen](#).

The bottom half of the screen displays information about the customer's past orders. You can maintain or inquire on a specific order by selecting Change or Display, respectively, for the selected order; or, you can advance to the order maintenance selection screen by selecting Order Maint.

How to display a customer: You can display customer and order information by:

- entering a valid customer number in the *Sold to* field, or scanning for the customer by prompting on the field
- entering a valid order number for a customer in the *Order #* field

See the field descriptions below for more information.

Field	Description
Customer information:	
Sold to	The number to identify the sold-to customer who is calling. To scan: You can enter the customer number in this field, or you can scan by clicking on the arrow. The Select Customer Sold To pop-up window opens. See the description of the Select Customer Sold To For Order Screen for complete field descriptions and instructions. <i>Numeric, 9 positions; optional.</i>
Name	The customer's name, consisting of: Prefix A title (such as "Mrs." or "Dr.") that precedes the customer's name. <i>Alphanumeric, 3 positions; display-only.</i> First Name The Sold-to customer's first name. <i>Alphanumeric, 15 positions; display-only.</i> Initial The initial of the customer's middle name. <i>Alphanumeric, 1 position; display-only.</i> Last Name The customer's last name. <i>Alphanumeric, 25 positions; display-only.</i> Suffix An addition to the customer's full name (such as "M.D.," "Fr.," or "III"). <i>Alphanumeric, 3 positions, display-only.</i>
Company	The name of the company associated with the customer. <i>Alphanumeric, 30 positions; display-only.</i>
Street	The customer's street address. This is the primary delivery address. <i>Alphanumeric, 32 positions; display-only.</i>
Apt./suite	The apartment number or suite number associated with the customer's delivery address. <i>Alphanumeric, 10 positions; display-only.</i>

Field	Description
City	The city where the customer lives or receives mail or shipments. <i>Alphanumeric, 25 positions; display-only.</i>
St (State)	The state or province where the customer lives or receives mail or shipments. <i>Alphanumeric, 2 positions; display-only.</i>
Postal code	The postal or zip code for this customer. <i>Alphanumeric, 10 positions; display-only.</i>
Country	The code for the customer's country. <i>Alphanumeric, 3 positions; display-only.</i>
Email	The customer's primary email address. This address, like any other email addresses for the customer, is stored in the Customer Sold To Email table; in addition, the primary email address is also stored in the Customer Sold To table. The primary email address defaults in order entry. See Working with Customer Email Addresses for an overview. <i>Alphanumeric, 50 positions; display-only.</i>
Opt In	Indicates the preferred method of correspondence. Valid values are: • O1 (All) = Email is the preferred method for all correspondence. • O2 (Order) = Use email for order-related correspondence only; generate a document for other correspondence. • O3 (None) = Do not use email for any correspondence; generate a document instead. • O4 (Don't Ask) = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified.

 Note:

The above values use the letter O, not the number 0 (zero).

Email notifications: See [When Does the System Generate an Email Notification?](#) for an overview.

Display-only.

Field	Description
Phone	The phone numbers and extensions for the sold-to customer. The fields here are based on the following system control values: - The Phone Numbers (D15) system control value determines whether the third phone number (fax or mobile) or the evening phone number is listed after the daytime phone number. The possible settings for this system control value are <i>DAY/EVE</i> and <i>DAY/FAX</i>. - If the Phone Numbers (D15) system control value is set to <i>DAY/FAX</i>, the Third Phone Number Type (L53) system control value determines whether the third phone number is labeled the <i>Fax</i> or <i>Mobile</i> number. See the Phone Numbers (D15) and Third Phone Number Type (L53) system control values for more information. <i>Phone number: alphanumeric, 14 positions each field; display-only.</i> <i>Extension: alphanumeric, 4 positions; display-only.</i>
Customer Price Group	The code and the first 15 positions of the description of the customer price group assigned to the sold to customer. See Working with Customer Price Groups (WCPG). If you do not assign a customer price group to a customer, the system assigns the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value to the customer. <i>Customer price group code: Alphanumeric 4 positions; display-only.</i> <i>Customer price group description: Alphanumeric, 15 positions; display-only.</i>
Msg	One 80-position field that displays the text entered for the four 20-position Pop up window messages 1-4 fields defined for the sold to customer. Example: If the following pop-up window messages are defined for the sold to customer: - THIS SOLD TO CUSTOMER - R HAS AN OUTSTANDING - BALANCE THAT MUST B - E REVIEWED ASAP. Then the <i>Msg</i> field displays as: THIS SOLD TO CUSTOMER HAS AN OUTSTANDING BALANCE THAT MUST BE REVIEWED ASAP. These messages display on the Display Pop Up Msgs For Window in order entry for this customer; however if you view these messages on the Customer Selection screen before advancing to an order, the pop up window does not display during order entry. <i>Alphanumeric, 80 positions; display-only.</i>
Active since	The date of the customer's first order, from the <i>Active since date</i> in the Customer Sold To Order History table. <i>Numeric, 6 positions (in user date format); display-only, updated by the system.</i>

Field	Description
LTD \$	The total merchandise value of the orders placed by the customer, including any backordered or soldout items. This total does not reflect returns created through order entry and does not include the merchandise value associated with quotes. Updates: If the Update Demand for Order Maintenance Transactions (C72) system control value is selected, this field updates when you add a detail line(s) to an order in Order Maintenance. When you enter an exchange, the price of the exchange (replacement) item is added. If the Update Demand for Order Maintenance Transactions (C72) system control value is unselected, this field does not update when you add a detail line(s) to an order in Order Maintenance, including an exchange item. Cancellations: This total reduces when you cancel an order only if you enter a cancel reason set to update demand; otherwise, the orders amount remains the same and the Cancels amount increases. <i>Numeric, 20 positions with a 2-place decimal; display-only.</i>
LTD Orders	The gross number of orders placed by this customer. Updates: If the Update Demand for Order Maintenance Transactions (C72) system control value is selected, this field increases when you add a detail line(s) to an order in Order Maintenance. If the Update Demand for Order Maintenance Transactions (C72) system control value is unselected, this field does not update when you add a detail line(s) to an order in Order Maintenance. Cancellations: This total reduces when you cancel an order only if you enter a cancel reason set to update demand; otherwise, the orders quantity remains the same and the Cancels quantity total increases. The total does not increase when you enter a return through order entry or enter an exchange item on an order that is already open or held. <i>Numeric, 5 positions; display-only.</i>
Return %	The total percentage of items returned by this customer, calculated as: $((\text{Return \$ amount} + \text{Exchange \$ amount}) / \text{Sales \$ amount}) * 100$ Example: If the total value of returned and exchanged items is \$100, and the customer's total sales to date is \$500, the return percentage is \$20, or $(\\$100 / \\$500) * 100$. See the Display Customer Order History Screen for information on how the Sales amount and the Returns amount are calculated. <i>Numeric, 3 positions with a 2-place decimal; display-only.</i>
Item class	The three item classes from which the customer has ordered the greatest dollar value, in descending order; the three item classes on the Display Customer Item Class Screen with the highest <i>LTD totals</i>. The item class description is truncated to 15 positions. <i>Item class code: alphanumeric, 3 positions; display-only.</i> <i>Item class description: alphanumeric, 15 positions; display-only.</i>

Field	Description
Customer Class	A code used to group customers. See Setting Up the Customer Class Table (WCCL) for a discussion. The first 15 positions of the description of the customer class is to the right. <i>Customer class code: alphanumeric, 3 positions; display-only.</i> <i>Customer class description: alphanumeric, 15 positions; display-only.</i>
Loyalty card#	The loyalty card number assigned to the sold to customer through the Customer Engagement Loyalty Integration. If Oracle Retail Customer Engagement finds more than one loyalty card assigned to the customer, the system displays the first card assigned to the customer.

 Note:

This field displays only if the [Use ORCE Loyalty \(M06\)](#) system control value is selected; the loyalty card number is from Oracle Retail Customer Engagement and is not stored in the Order Administration database.

Points

The total current earned points balance for the loyalty card assigned to the sold to customer through the [Customer Engagement Loyalty Integration](#).

 Note:

This field displays only if the [Use ORCE Loyalty \(M06\)](#) system control value is selected; the loyalty points is from Oracle Retail Customer Engagement and is not stored in the Order Administration database.

Awards

The total current awards balance for the loyalty card assigned to the sold to customer through the [Customer Engagement Loyalty Integration](#).

 Note:

This field displays only if the [Use ORCE Loyalty \(M06\)](#) system control value is selected; the awards balance is from Oracle Retail Customer Engagement and is not stored in the Order Administration database.

Field	Description
Order information:	
Order#	A number representing an order the customer has placed with your company. You can display customer information by entering a valid order number in this field. If the order is associated with a different sold-to customer, the screen displays the information on the newly-selected customer. However, if you then scan on a customer using the Sold to field at the top of the screen, the screen clears the previous customer's information and displays the information for the newly-selected customer. <i>Numeric, 8 positions; optional.</i>
Status (Order status)	The current status of the order. Valid values are: • blank (all orders, including open) • Cancelled • Error • Held • Purged • Quote • Suspended • Closed Select a status code to display orders that match your entry. <i>Optional.</i>
Type	A code representing the type of order. Order type codes identify how you received the order, such as by phone, mail or fax, and control attributes such as screen formats, and messaging. <i>Alphanumeric, 1 position; display-only.</i>
Rcp (Number of recipients)	The number of recipients on the order. <i>Numeric, 3 positions; display-only.</i>
Date	The date you entered the order. <i>Numeric, 6 positions (in user date format); optional.</i>
Order total	The total value of the order, including merchandise, tax, freight, and all other charges. <i>Numeric, 20 positions with a 2-place decimal; display-only.</i>
Activity	These fields indicate whether any item on the order has been returned or exchanged, and whether the order includes any backordered items. The return indicator (RT) is provided in column 1, the exchange indicator (EX) in column 2, and the backorder indicator (BO) in column 3. Quotes: The system does not update this field for backordered items on quotes; see Entering Pre-Order Quotes for an overview. <i>Alphanumeric, three 2-position fields; display-only.</i>
R/E date	The date of the most recent return or exchange. If an order has both a return and an exchange, the return date is provided. <i>Numeric, 6 positions (in user date format); display-only.</i>

Screen Option	Procedure
Maintain an order	Select Maintenance for an order to advance to the Work with Order screen. See Performing Order Maintenance. Require Order Maintenance Reason: If the Require Reason in CTI (G98) system control value is selected and you do not have authority to the Bypass CTI Reason Code (B24) secured feature, the system advances you to the Order Inquiry Reason Codes Window when you return to the Customer Selection screen after maintaining an order.
Review an order	Select Inquiry for an order to advance to the Order Inquiry screen. See Order Inquiry. Require Order Inquiry Reason: If the Require Reason in CTI (G98) system control value is selected and you do not have authority to the Bypass CTI Reason Code (B24) secured feature, the system advances you to the Order Inquiry Reason Codes Window when you return to the Customer Selection screen after reviewing an order.
Enter a new order or quote	Select Create Order. See Entering Orders for standard order entry or Entering Pre-Order Quotes for quote entry.
 Note: If the customer is a ghost customer, identified by the <i>Ghost</i> flag, the system opens the Ghost Customer Number Warning Window.	
Change the order entry defaults	Select Change Defaults to display the Change Defaults window.
Select an order or quote for maintenance	Select Order Maint to advance to the order maintenance selection screen. See Selecting an Order for Maintenance .
Change the customer's name or address	Select Customer Maint to advance to the Change Cust Sold to Name & Address Screen .
Review item availability, preselect items to add to an order, or enter lost sales	Select Item Availability to advance to the Display Item Availability Screen .
Review or work with customer notes	Select Customer Notes to advance to the Edit Customer Notes Screen .
Work with ticklers associated with the sold to customer	Select Work with Ticklers to advance to the Work with Ticklers Screen (sold to customer view) .
Work with customer call log entries	Select Call Log to advance to the Work with Customer Call Log Screen (WCLL) .
Display the Call Options pop-up window	Select Call Options to advance to the Call Options Window in order to disconnect a call or create a call log entry.
Review items that a customer has previously ordered	Select Cust Item History to advance to the Customer Order Item History Screen .

Screen Option	Procedure
Perform a stored value card balance inquiry	Select Balance Inquiry to advance to the Stored Value Card Balance Inquiry Screen (MSVB) .

 Note:

The system returns you to the Customer Selection screen after you complete the balance inquiry.

Review loyalty account information for a customer that is registered in the Oracle Retail Customer Engagement Loyalty program

Select Loyalty. When you select this option, the system retrieves the sold to customer's information from Oracle Retail Customer Engagement.

- If Oracle Retail Customer Engagement finds a loyalty card assigned to the customer, the system advances you to the [Display Loyalty Account Screen](#). If more than one loyalty card is assigned to the customer in Oracle Retail Customer Engagement, the system displays loyalty account information for the first card assigned to the customer.
- If Oracle Retail Customer Engagement does not find a loyalty card for the customer, the system advances you to the [Customer Loyalty Registration Window](#), where you can select to enroll the customer in the Oracle Retail Customer Engagement Loyalty program.
- If a *Relate ID* is not defined for the customer in the Customer Sold To table, the system displays an error message similar to the following: This customer does not have a Relate ID.
- If a connection could not be made to Oracle Retail Customer Engagement, the system displays an error message similar to the following: Unable to connect to ORCE.

 Note:

This option is available only if the Use ORCE Loyalty (M06) system control value is selected.

See [Customer Engagement Loyalty Integration](#) for processing details.

Screen Option	Procedure
Review the customer's purchase history from Oracle Retail Customer Engagement	Select Purchase History. When you select this option, the system retrieves the sold to customer's information from Oracle Retail Customer Engagement and advances you to the Display Purchase History Screen where you can review the completed sales and returns transactions from Oracle Retail Customer Engagement. If a connection could not be made to Oracle Retail Customer Engagement, the system displays an error message similar to the following: Unable to connect to ORCE.

 Note:

This option displays only if the ORCE Customer Integration (L37) system control value is set to INTERACT; see [Customer Engagement Purchase History Integration](#).

Call Options Window

Purpose: Use this window to disconnect a CTI call or advance to the Log Telephone Call Screen (Entering or Changing a Call).

 Note:

Transferring a call and creating a conference call are not currently implemented.

How to display this screen: Select Call Options at the [Customer Selection Screen](#).

Field	Description
CTI session (unlabeled field)	This field indicates whether your current session is being monitored for CTI call handling. - If you are in a monitored CTI session, a background job is currently running to monitor call activity for your session. For monitored CTI sessions, the first 23 positions of the <i>Company phone number description</i> are at the top of this screen, allowing you to identify the DNIS number the customer called and indicating which call center script the customer service representative should use when answering the call. - If you are in an unmonitored CTI session, CTI call handling is not currently active. For unmonitored CTI sessions, the word UNMONITORED displays at the top of the screen. <i>Alphanumeric, 23 positions; display-only.</i>
Customer	The number and name, or company name, of the currently selected customer. <i>Customer number: numeric, 9 positions; display-only.</i> <i>Customer name: alphanumeric, 41 positions; display-only.</i>

Field	Description
Transfer/Conference extension	The extension to which you would like to transfer the call, or with which you would like to create a conference call.
	 Note: Transferring a call or creating a conference call are not currently implemented.
Monitored workstation	<i>Alphanumeric, 4 positions; required to transfer or conference.</i> This field is not currently implemented.
Screen Option	Procedure
Transfer a call	Select Xfer. This option is not currently implemented.
Create a conference call	Select Conf. This option is not currently implemented.
Disconnect a call	Select Disconnect. The call is ended, and you advance to the Log Telephone Call Screen (Entering or Changing a Call) .
Create a call log entry	Select Create Log to advance to the Log Telephone Call Screen (Entering or Changing a Call) .

Customer Scan Screen

Purpose: Use this screen to select a customer:

- for an order, in order entry
- for maintenance, in customer maintenance
- for a customer membership through the [Working with Customer Memberships \(WWCM\)](#) option

Used when? You advance to this screen if the [ORCE Customer Integration \(L37\)](#) system control value is set to INTERACT. Otherwise, you advance to:

- the [Select Customer Sold To For Order Screen](#) in order entry
- the [Select Customer Sold To Screen](#) in customer maintenance
- the Select Customer Sold To pop-up window when you are creating a customer membership through the [Working with Customer Memberships \(WWCM\)](#) option

Searching in Oracle Retail Customer Engagement: When you use this screen, the system first calls Oracle Retail Customer Engagement when searching for customers, and checks the Order Administration Customer Sold To table only if Oracle Retail Customer Engagement does not return any records that match your search criteria.

If any records found in Oracle Retail Customer Engagement: If there is at least one customer record in Oracle Retail Customer Engagement that matches your search criteria, the screen displays the results from Oracle Retail Customer Engagement only and does not display any matching records from the Order Administration Customer Sold To table.

In this topic:

- [Search](#)
- [Results](#)
- [Order entry: available options](#)
- [Customer maintenance: available options](#)
- [Creating a customer membership: available options](#)

For more information: See the [Customer Engagement Customer Integration](#) for an overview and background on the integration.

How to display this screen: If the [ORCE Customer Integration \(L37\)](#) system control value is set to INTERACT:

- order entry:
 - select OK at the [Default Values for Orders](#) screen if you do not use the [Customer Selection Screen](#), or
 - prompt on the *Sold To* field at the [Customer Selection Screen](#)
 - prompt for a recipient sold to customer at the [Work with Order Screen](#).
- customer maintenance: enter WCST in the *Fast path* field at the top of any menu or select Work with Customers from a menu
- creating a customer membership: prompt on the *Customer#* field at the [Create Customer Membership Window](#)

Search

All of the fields in the Search at the top of the screen, with the exception of the *Batch #* available in order entry, are optional; however, you need to enter at least one criterion to search.

Combining search criteria: If you enter more than one search criterion, the [Results](#) displays customer records only if they match all entered criteria. You can combine any search criteria except for the [Customer#](#) and the [Alternate customer number](#).

Field	Description
Batch #	The number identifying the batch you are currently working with. Available only if you are in order entry and you selected the <i>Error order batches</i> option at the Default Values for Orders screen. <i>Numeric, 5 positions; display-only.</i>

Field	Description
Postal code	A postal delivery area, such as a zip code. Enter a full or partial code to scan for customers whose postal codes match your entry.  Note: The Postal Code Scan Length (F61) system control value does not control how to search for or sort customer records based on postal code. For example, if you normally use a postal code scan length of 5 for searching, and some customers have the full ZIP+4 postal code, customers with the full ZIP+4 are listed after customers whose postal codes are just 5 positions long.
	See Setting Up the Zip/City/State (Postal Code) Table (WZIP). <i>Alphanumeric, 10 positions.</i>
Last name	The sold-to customer's last name. Enter a full or partial last name to scan for customers whose last names match your entry. <i>Alphanumeric, 25 positions.</i>
First name	The sold-to customer's first name. Enter a full or partial first name to scan for customers whose first names match your entry. <i>Alphanumeric, 25 positions.</i>

Field	Description
Phone#	Any of the sold-to customer's phone numbers. Enter a full or partial phone number to display customers with phone numbers that start with your entry. When you search based on phone number, the Phone # displayed on the Results is the one matching your entry. Formatting not required: When you search using phone number against the Oracle Retail Customer Engagement database, it is not necessary to enter any formatting for the phone number; for example, an entry of 5085550100 matches a phone number formatted as (508) 555-0100. Deleted phone numbers: Even if you delete the phone number from Oracle Retail Customer Engagement and the number is no longer visible on Oracle Retail Customer Engagement screens, Oracle Retail Customer Engagement still stores the phone number for the customer in the database, and returns the customer in search results when you search based on the deleted phone number. Changed phone number: Similarly, if you change the phone number in Oracle Retail Customer Engagement, Oracle Retail Customer Engagement still stores the original phone number in its database and returns the customer in search results when you searched based on the original phone number. Deleted or changed phone number not displayed in results: If your search is based on a deleted or changed phone number for the customer, the Phone # field is blank at the Results, even if the customer has a current primary phone number. Searching based on phone number in Order Administration: Enter a full, valid phone number to display customers who have a phone number that matches your entry exactly, including formatting. The screen displays results from Order Administration only if no customer records in Oracle Retail Customer Engagement match your entry. You can define a telephone number format for each country to map to the phone numbers operators enter into the system. See Setting Up the Country Table (WCTY). <i>Alphanumeric, 14 positions.</i>

Field	Description
Email	Any of the customer's email addresses. Searching based on email address: Enter a full or partial email address to display customers with email addresses that start with your entry. The email address that matches your entry is displayed in the Email field at the Results, even if it is not the customer's primary email address in Oracle Retail Customer Engagement or in Order Administration. Deleted email addresses: Even if you delete the email address from Oracle Retail Customer Engagement and the email is no longer visible on Oracle Retail Customer Engagement screens, Oracle Retail Customer Engagement still stores the email address for the customer in the database, and returns the customer in search results when you search based on the deleted email address. Changed email address: Similarly, if you change the email address in Oracle Retail Customer Engagement, Oracle Retail Customer Engagement still stores the original email address in its database and returns the customer in search results when you searched based on the original email address. Deleted or changed email address not displayed in results: If your search is based on a deleted or changed email address for the customer, the Email field is blank at the Results, even if the customer has any current email addresses. <i>Alphanumeric, 50 positions.</i>
Customer#	A number assigned by the system to identify the customer in Order Administration. Saved in Oracle Retail Customer Engagement as an alternate key. Enter a valid customer number to advance immediately to: - the Customer Selection Screen in order entry - the Change Customer (1 of 2) screen in customer maintenance You cannot enter any additional search criteria when you enter a customer number. <i>Numeric, 9 positions.</i>
Loyalty Card#	The loyalty card number assigned to the customer through the Customer Engagement Loyalty Integration. Enter a valid loyalty card number display customers whose loyalty card number matches your entry.
	 Note: This field is available only if the Use ORCE Loyalty (M06) system control value is selected. <i>Numeric, 16 positions.</i>

Results

System Providing Customer Information: The Results section of the screen indicates whether the results displayed are from Oracle Retail Customer Engagement or Order Administration. If there is at least one record found in Oracle Retail Customer Engagement that

matches your search criteria, the results from Oracle Retail Customer Engagement are displayed instead of any results from Order Administration.

Maximum search results exceeded: The Results display the error message *Maximum search results exceeded, please refine your search* if the number of matching records exceeds the *Customer Lookup Limit* setting in Customer Engagement. In this situation, you need to make your search criteria more specific to make sure that you can find the customer record you are looking for.

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

Field	Description
System Providing Customer Information	The name of the system where the customer results were found. When you use this screen, the system first calls Oracle Retail Customer Engagement when searching for customers, and checks the Order Administration Customer Sold To table only if Oracle Retail Customer Engagement does not return any records that match your search criteria. If there is at least one customer record in Oracle Retail Customer Engagement that matches your search criteria, the screen displays the results from Oracle Retail Customer Engagement only and does not display any matching records from the Order Administration Customer Sold To table.
Name	The customer's name, consisting of the last name, middle initial, and first name. If results are from Oracle Retail Customer Engagement: The company name is not displayed; and if the customer has a company name only, but no first and last name, then no name is displayed. Enter a full or partial name to display customers whose name contains your entry. <i>Last name: alphanumeric, 25 positions.</i> <i>Middle initial: alphanumeric, 1 positions.</i> <i>First name: alphanumeric, 15 positions.</i> <i>Company name (from Order Administration only): alphanumeric, 30 positions.</i>
Address	The customer's address, consisting of the first address line, city, and state. Enter a full or partial address to display customers whose address contains your entry. <i>Street: alphanumeric, 32 positions.</i> <i>City: alphanumeric, 25 positions.</i> <i>State: alphanumeric, 2 positions.</i>
Postal code	The customer's postal code. Enter a full or partial postal code to display customers whose postal code contains your entry. <i>Alphanumeric, 10 positions.</i>

Field	Description
Phone #	If results are from Oracle Retail Customer Engagement: The customer's primary phone number, unless: - an alternate phone number was one of the search criteria; in this case, the alternate phone number is displayed. - there is no primary phone number, and a phone number was not a search criterion; in this case, no phone number is displayed.  Note: The phone number is displayed using the formatting, if any, from Oracle Retail Customer Engagement. If results are from Order Administration: The customer's: - daytime phone number, if any, unless a different phone number was a search criterion; otherwise, - the phone number entered as a search criterion, if any; otherwise, - the customer's evening number, if any; otherwise, - the customer's fax or mobile number, if any; otherwise, - this field is blank. Enter a full or partial phone number to display customers whose phone number contains your entry. <i>Alphanumeric, 14 positions.</i>
Email	If results are from Oracle Retail Customer Engagement: The customer's primary email address, unless: - An alternate email address was one of the search criteria; in this case, the alternate email address is displayed. - An email address was one of the search criteria, but the customer does not have a primary email address in Oracle Retail Customer Engagement; in this case, the email address matching the search criterion is displayed. - An email address was one of the search criteria, and the customer once had this email address in Oracle Retail Customer Engagement, but the email address has been deleted or changed; in this case, the email address field is blank. - Email address was not one of the search criteria, and the customer does not have a primary email address in Oracle Retail Customer Engagement; in this case, no email address is displayed, even if the customer has one or more email addresses in Oracle Retail Customer Engagement. Ordinarily, the customer's email address is the same in both Order Administration and Oracle Retail Customer Engagement. If results are from Order Administration: The customer's primary email address, unless an alternate email address was a search criterion. Enter a full or partial email address to display customers whose email address contains your entry. <i>Alphanumeric, 50 positions.</i>

Order entry: available options

Screen Option	Procedure
Enter an order or quote for a new customer	Select Create. See Entering Orders for standard order entry or Entering Pre-Order Quotes for quote entry.
Select a customer for order entry	Click the customer's name, or select Select from the <i>Action</i> drop-down menu. See Entering Orders for standard order entry or Entering Pre-Order Quotes for quote entry.
Change a customer	Select Change for a customer from the <i>Action</i> drop-down menu to advance to the Change Cust Sold to Name & Address Screen .
Display a customer	Select Display for a customer from the <i>Action</i> drop-down menu to advance to the Display Customer Sold To screen. See the First Create Sold To Customer Screen for field descriptions.
Review loyalty account information from Oracle Retail Customer Engagement for a customer	Select Loyalty from the <i>Action</i> drop-down menu for a customer. When you select this option, the system retrieves the sold to customer's information from Oracle Retail Customer Engagement. • If Oracle Retail Customer Engagement finds a loyalty card assigned to the customer, the system advances you to the Display Loyalty Account Screen. If more than one loyalty card is assigned to the customer in Oracle Retail Customer Engagement, the system displays loyalty account information for the first card assigned to the customer. • If Oracle Retail Customer Engagement does not find a loyalty card for the customer, the system advances you to the Customer Loyalty Registration Window, where you can select to enroll the customer in the Oracle Retail Customer Engagement Loyalty program. • If a <i>Relate ID</i> is not defined for the customer in the Customer Sold To table, the system displays an error message similar to the following: Loyalty cannot be displayed, there is no Relate ID. • If a connection could not be made to Oracle Retail Customer Engagement, the system displays an error message similar to the following: Unable to connect to ORCE.

 Note:

This option is available only if the Use ORCE Loyalty (M06) system control value is selected.

See Customer Engagement Loyalty Integration for processing details.

Screen Option	Procedure
Review the customer's purchase history from Oracle Retail Customer Engagement	Select Purch Hist. When you select this option, the system retrieves the sold to customer's information from Oracle Retail Customer Engagement and advances you to the Display Purchase History Screen where you can review the completed sales and returns transactions from Oracle Retail Customer Engagement. If a connection could not be made to Oracle Retail Customer Engagement, the system displays an error message similar to the following: Unable to connect to ORCE.
 Note: This option displays only if the ORCE Customer Integration (L37) system control value is set to INTERACT; see Customer Engagement Purchase History Integration.	
Exit the screen and return to the main menu	Select Exit. If the Capture Order/Call Disposition (K03) system control value is set to ALL, and you advanced to this screen from a call received from an external order call center, the system displays the Confirm Order/Call Disposition Window where you must enter the reason for exiting this screen instead of creating an order. In addition, the system creates a record in the Order Disposition Table; see Tracking Order/Call Disposition Activity.

Customer maintenance: available options

Screen Option	Procedure
Create a new customer	Select Create. See the First Create Sold To Customer Screen .
Change information about the customer	Select Change from the <i>Action</i> drop-down menu for a customer. See Changing Sold To Customers .
Display information about the customer	Select Display from the <i>Action</i> drop-down menu for a customer. You advance to the first Display Customer screen. You cannot change any information on this screen. See the First Create Sold To Customer Screen for field descriptions.
Work with actions for a customer	Select Actions from the <i>Action</i> drop-down menu for a customer to advance to the Edit Customer Actions Window .

Screen Option	Procedure
Work with bill-to customers	Select Bill To from the <i>Action</i> drop-down menu for a customer. If the customer: - already has a bill-to customer, you advance to the Display Customer Bill To screen. See the Create Bill-to Customer Screen for field descriptions. - does not already have a bill-to customer, you advance to the Work with Bill To Customers Screen.
	 Note: If you do not have authority to the Work with Customer Bill To menu option, the Bill To option is not available in the <i>Action</i> drop-down menu.
Work with contract pricing for a customer	Select Contract Price from the <i>Action</i> drop-down menu for a customer to advance to the Work with Contract Price Screen .
Review item ordering history for a customer	Select Item Hist from the <i>Action</i> drop-down menu for a customer to advance to the Customer Sold To Item History Screen . See Reviewing Customer History for an overview of customer history.
Review loyalty account information from Oracle Retail Customer Engagement for a customer	Select Loyalty from the <i>Action</i> drop-down menu for a customer. When you select this option, the system retrieves the sold to customer's information from Oracle Retail Customer Engagement. - If Oracle Retail Customer Engagement finds a loyalty card assigned to the customer, the system advances you to the Display Loyalty Account Screen. If more than one loyalty card is assigned to the customer in Oracle Retail Customer Engagement, the system displays loyalty account information for the first card assigned to the customer. - If Oracle Retail Customer Engagement does not find a loyalty card for the customer, the system advances you to the Customer Loyalty Registration Window, where you can select to enroll the customer in the Oracle Retail Customer Engagement Loyalty program. - If a <i>Relate ID</i> is not defined for the customer in the Customer Sold To table, the system displays an error message similar to the following: Loyalty cannot be displayed, there is no Relate ID. - If a connection could not be made to Oracle Retail Customer Engagement, the system displays an error message similar to the following: Unable to connect to ORCE.

 Note:

This option is available only if the Use ORCE Loyalty (M06) system control value is selected.

See [Customer Engagement Loyalty Integration](#) for processing details.

Screen Option	Procedure
Review mail history for a customer	Select Mail Hist from the <i>Action</i> drop-down menu for a customer to advance to the Display Customer Mail History Screen . See Reviewing Customer History for an overview of customer history.
Work with notes about a customer	Select Notes from the <i>Action</i> drop-down menu for a customer to advance to the Edit Customer Notes Screen .
Display customer order history	Select Ord Hist from the <i>Action</i> drop-down menu for a customer to advance to the Display Customer Order History Screen . See Reviewing Customer History for an overview of customer history.
Exclude pay types for a customer	Select P/T Excl from the <i>Action</i> drop-down menu for a customer to advance to the Exclude Pay Types By Customer Screen .
Review address changes for a customer	Select Prev Addr from the <i>Action</i> drop-down menu for a customer to advance to the Display Address Changes Screen . See Reviewing Customer Address Changes for an overview.
Work with the profile for a customer	Select Profile from the <i>Action</i> drop-down menu for a customer to advance to the Work with Customer Profile Screen .
Review the customer's purchase history from Oracle Retail Customer Engagement	Select Purch Hist. When you select this option, the system retrieves the sold to customer's information from Oracle Retail Customer Engagement and advances you to the Display Purchase History Screen where you can review the completed sales and returns transactions from Oracle Retail Customer Engagement. If a connection could not be made to Oracle Retail Customer Engagement, the system displays an error message similar to the following: Unable to connect to ORCE.
 Note: This option displays only if the ORCE Customer Integration (L37) system control value is set to <i>INTERACT</i>; see Customer Engagement Purchase History Integration.	
Work with ship-to customers	Select Ship To from the <i>Action</i> drop-down menu for a customer to advance to the Work with Customer Ship Tos Screen .
Work with subscriptions for a customer	Select Subscription from the <i>Action</i> drop-down menu for a customer to advance to the Work with Subscriptions Screen .
Work with state-specific tax exemptions for a customer	Select Tax from the <i>Action</i> drop-down menu for a customer to advance to the Work with Customer Tax Screen . See Working with Customer Tax Status for an overview.
Enter information in the user-defined fields for a customer	Select User Fields from the <i>Action</i> drop-down menu for a customer to advance to the Work with User Fields Screen .
Work with warranty information for a customer	Select Warranty from the <i>Action</i> drop-down menu for a customer to advance to the Work with Customer Warranty Information Screen .

Creating a customer membership: available options

Option	Procedure
Select a customer for a customer membership	Select Select from the <i>Action</i> drop-down menu for a customer to advance to the Customer Membership Screen (Change Mode) with that customer's name and address defaulted.
Change a customer's name and address information	Select Change from the <i>Action</i> drop-down menu for a customer to advance to the Change Cust Sold to Name & Address Screen .
Display a customer's name and address information	Select Display from the <i>Action</i> drop-down menu for a customer to advance to the Display Customer Sold To screen. See the First Create Sold To Customer Screen for field descriptions.
Review loyalty account information from Oracle Retail Customer Engagement for a customer	Select Loyalty from the <i>Action</i> drop-down menu for a customer. When you select this option, the system retrieves the sold to customer's information from Oracle Retail Customer Engagement. • If Oracle Retail Customer Engagement finds a loyalty card assigned to the customer, the system advances you to the Display Loyalty Account Screen. If more than one loyalty card is assigned to the customer in Oracle Retail Customer Engagement, the system displays loyalty account information for the first card assigned to the customer. • If Oracle Retail Customer Engagement does not find a loyalty card for the customer, the system advances you to the Customer Loyalty Registration Window, where you can select to enroll the customer in the Oracle Retail Customer Engagement Loyalty program. • If a <i>Relate ID</i> is not defined for the customer in the Customer Sold To table, the system displays an error message similar to the following: <code>Loyalty cannot be displayed, there is no Relate ID.</code> • If a connection could not be made to Oracle Retail Customer Engagement, the system displays an error message similar to the following: <code>Unable to connect to ORCE.</code>

 Note:

This option is available only if the Use ORCE Loyalty (M06) system control value is selected.

See [Customer Engagement Loyalty Integration](#) for processing details.

Option	Procedure
Review the customer's purchase history from Oracle Retail Customer Engagement	Select Purch Hist. When you select this option, the system retrieves the sold to customer's information from Oracle Retail Customer Engagement and advances you to the Display Purchase History Screen where you can review the completed sales and returns transactions from Oracle Retail Customer Engagement. If a connection could not be made to Oracle Retail Customer Engagement, the system displays an error message similar to the following: Unable to connect to ORCE.

 Note:

This option displays only if the ORCE Customer Integration (L37) system control value is set to INTERACT; see [Customer Engagement Purchase History Integration](#).

Entering Orders

Purpose: This topic describes how you enter orders:

- You enter or verify customer and order information on the [Work with Order Screen](#).
- You add items to the order on the [Work with Order Lines Screen \(Adding Items to the Order\)](#).

Additionally, this topic describes how to attach payment information to the order and how to end the order. When you finish this topic, you will know how to enter a complete order on the system, including:

- Who is placing the order?
- What items are being ordered?
- What is the method of payment?
- What happens when you complete the order?

Once you use the steps outlined in this topic, you will have an order on the system; you can enhance the order in several different ways by selecting any of the functions listed at the bottom of the screen.

Entering quotes: See [Entering Pre-Order Quotes](#) for more information on creating a pre-order quote for a customer listing the items the customer wishes to order and the order totals should the customer agree to place the order.

Entering a ship-for-pickup order: Use the Store option, available at the [Create One Time Ship To Address Screen](#), to select the store location where the customer wants to pick up the order. See [Ship-for-Pickup Orders](#) for an overview.

In this topic:

Who is placing the order?

- [Work with Order Screen](#)

- Defining Order Controls
- Adding Customer/Address Information
- Adding Order Information
- Reviewing Order Totals
- Display Duplicate Sold To Window
- When a Window Opens

What items are being ordered?

- Work with Order Lines Screen (Adding Items to the Order)
 - Order Information Fields
 - Item Image
 - Order Totals
 - Item Entry Fields
 - Order Lines Fields
- Screen Differences to Note When Using SKUs
 - SKU Scan Screen
- Adding Different Types of Items to the Order
 - Entering a Subscription Item
 - Entering a Warranty Item
 - Entering a Stored Value Card Item
 - Entering Set Items
 - Entering Multiple Ship-Alone Units on a Ship-for-Pickup Order
- Select Variable Set Items Screen
- Miscellaneous Messages and Windows at Item Entry
 - Discount Calculation Messages
 - Maximum Order Line Quantity/Value
 - Work with Item/SKU Comments Window
 - Enter Add Reason Window
 - Item Coordinate Message
 - Ship Via Overrides for Item Window
 - Item Status Message Window
 - Duplicate Item for Customer Window
- Displaying the Detail Line Options
- Completing the Work with Order Lines Screen
- Order Repricing, Premiums, Discounts, and Promotions
 - Types of Discounts and Promotions Applied During Repricing
 - When Repricing Occurs
 - Applying Order Audit Discounts during Repricing

- Order Audit Discounts during Repricing Process Flow
- Repricing Screen Flow
- Price Table Repricing
- Display Premiums Screen (Price Table Premiums)
- Enter Coupon Discount Amount Window
- Enter Promotion Code Screen
- Enter Coupon Discount Amount Window
- Applying Free Gifts
- Determining Gross Profit
 - Calculating Gross Profit Margin and Gross Profit Percentage
 - Calculating Gross Profit Margin and Percentage using Tax Inclusive Pricing (VAT)
- Work with Customer Profile

What is the method of payment?

- Default Paytype Pop-up Windows
 - Enter Cash Control For Window (Cash/Check Payment Type)
 - Enter Credit Card For Window (Credit Card Payment Type)
- Enter Payment Method Screen
- Scan Credit Card Accounts Screen
- Assigning a Payment Plan to the Order
 - Determining the Primary Payment Plan
 - Select Payment Plan Window
 - Display Payment Plan Summary Screen
- Pay Type Editing
 - Rules for Pay Type Combinations
- Determining the Charge Sequence

What happens when you complete the order?

- Alternate Shipping Charges by Via Window
- Work with Order/Recap Screen
- Accepting or Rejecting the Order
- Rejecting the Order
 - Confirm Order/Call Disposition Window
 - Confirm Reject Window
- Accepting the Order
 - Performing Online Credit Card Authorizations
 - Confirm Invalid Expiration Date Screen
- Order Entry Updates
 - Immediate Updates

- [Updates at Accept](#)
- [Updates During Background Processing](#)

Work with Order Screen

Purpose: This screen is the first screen that opens when you are entering an order.

How to display this screen: Set or accept Order Entry defaults at the [Default Values for Orders screen](#) and select the customer for Order Entry at the [Select Customer Sold To For Order Screen](#) or the [Customer Selection Screen](#).

Instructions:

1. Complete the necessary customer, address, and order information.
2. Select OK so the system can validate this information.
3. Press Enter again to advance to the [Work with Order Lines Screen \(Adding Items to the Order\)](#).



Note:

This topic describes simple Order Entry, which assumes that you complete the first screen and continue on to complete the second screen. You can, however, select any function listed at the bottom of the screen instead of adding items to the order immediately.

Defining Order Controls

The information you enter in the Order Control fields on the [Work with Order Screen](#) determines the format of the [Work with Order Lines Screen \(Adding Items to the Order\)](#) and controls whether freight is charged for the order.



Note:

Reservation occurs unconditionally for all orders (including Held orders) when you are using [Immediate Reservation \(A64\)](#), as defined in the System Control table.

The Order Controls fields are:

- [Order#](#)
- [Ship-to number \(unlabeled field\)](#)
- [Recip sts \(Recipient status\)](#)
- [Sold-to \(Sold-to customer number\)](#)
- [Type \(Order type\)](#)
- [Order date](#)
- [Calc freight \(Calculate freight\)](#)

System values: The system assigns values to several of the Order Control fields, including:

- [order#](#)

- ship-to number
- order date
- sold-to customer #
- recipient status
- hold reason
- calculate freight

Defaults: These fields in the Order Control part of the screen default, but can be overridden:

- *Order date* defaults to today's date.
- *Calc freight* defaults to selected.
- *Order type* defaults from the entry on the [Default Values for Orders screen](#).

Field	Description
Order#	A unique number assigned by the system to identify an order. Every order on the system is assigned an order number. This number is used throughout the system to access the order. The starting order number and last order number assigned are defined in the Number Assignment table. See Setting Up the Number Assignment Table (WNUM). <i>Numeric, 9 positions; display-only, assigned by the system.</i>
Ship-to number (unlabeled field)	A hyphen (-) separates this field from the <i>Order#</i> field. Indicates the number of shipping addresses for the order. The system assigns a ship-to suffix of <i>1</i> to a single recipient order. <i>Numeric, 3 positions; display-only, assigned by the system.</i>
Recip sts (Recipient status)	The status of the recipient (ship-to) order on the system. New orders The system assigns a suspended status to all new orders during Order Entry. You can review or maintain the orders from the Display Order Summary Screen. When you accept an order Once you accept the entire order, the system changes the status to open or held; however, when you batch orders, the individual orders in a batch remain in a suspended status until you accept the entire batch. Other status codes are: • Canceled, if all lines are canceled before you accept the order. • Closed, if all lines are sold out before you accept the order. See Using the Order Inquiry Scan Screens (OIOM) for more information about these order status codes. <i>Alphanumeric, 9 positions; display-only, assigned by the system.</i>
Sold-to (Sold-to customer number)	A number assigned by the system to identify the customer who is placing the order. The starting sold-to number and the last sold-to number are stored in the Number Assignment table. <i>Numeric, 9 positions; display-only, assigned by the system.</i>

Field	Description
Type (Order type)	A code that indicates how the order was received. Order types are defined in and validated against the Order Type table. Common order types include phone, fax, mail, retail or other. You use order type to group orders on the system, monitor employee performance and accuracy, and control the sort of several reports. See Establishing Order Types (WOTY).  Note: You can select a default order type in the System Control table or at the Default Values for Orders screen.
Order date	Reserving Against a Non-Allocatable Warehouse If the Reserve from Non-Allocatable Warehouse (J25) system control value is selected, the system allows you to reserve inventory against a non-allocatable warehouse. You can define a non-allocatable warehouse in the <i>Retail warehouse</i> field for the order type; any orders entered for this order type reserve against the non-allocatable warehouse. If the item is not in stock, the system backorders the item against the non-allocatable warehouse. See Non-Allocatable Warehouse Reservation Processing During Order Entry for more information. <i>Alphanumeric, 1 position; required.</i> The processing date for the order. Defaults to the current date, but you can override it to date-stamp orders you received on an earlier date but did not enter. However, if you change the order date to a date which falls within a closed accounting period, the following error message indicates: Order date falls within the closed accounting period. The order date determines which orders the system reserves first, if using Batch Reservation or running the Evaluate Backorders program. <i>Numeric, 6 positions (in user date format); required.</i>
Calc freight (Calculate freight)	Determines whether the system calculates and adds freight charges and any service charges by ship via to the order. - selected = (Default): The system calculates freight based on the freight method defined for the source code. You can also define a freight override for the order ship to at the Work with Order Ship to Properties Screen. - unselected = The system does not calculate freight.

Adding Customer/Address Information

Use the customer and address information fields on the [Work with Order Screen](#) to enter or verify the name and address of the customer who is placing the order. The customer/address information fields are:

- [Name](#)
- [Cmp \(Company\)](#)
- [Attn \(Attention\)](#)

- Street
- Apt
- M/F (Male/female)
- Postal
- City
- State
- Cnty (Country)
- Email
- OptIn
- Phone numbers
- Delivery
- Class (customer class)
- Rent
- Mail
- Currency
- Associate (Associate customer)

For an existing customer: The system places the cursor in the [Source](#) field when you select an existing customer for Order Entry. The source code may default, based on your system control values and the source code information retained in the Sold-to Customer table; you can also use the [Source Code Auto Retrieval Value \(H82\)](#) to retrieve the correct source code based on the most recent mailing to the customer, or to default a source code if the actual code is unknown. Information from the customer appears in the customer name and address information fields. This information is kept on file for the Sold-to customer and is called each time you select this customer.

Verify that the customer information is still accurate. If it did not already default, enter a source code in the Source field, and enter other required order information.

Instructions: To update the customer and address information:

1. Position the cursor at the first customer field that needs to be updated.
2. Enter over the information in the field.
3. Enter the required information.

The system updates the Sold-to Customer *automatically* when you change any customer information on the Order Entry screen.

**Note:**

The [Display/Update Bill to Screen](#) opens in Order Entry, Order Maintenance and in Work with Customers when you change the name or address of a Sold-to customer who is linked to a permanent Bill-to customer. The screen enables you to apply the changes made to the Sold-to address to the Bill-to address.

Oracle Retail Customer Engagement customer integration: When you use the Oracle Retail Customer Engagement customer integration, if you create or update a customer during order entry, Order Administration sends the current customer information to Oracle Retail

Customer Engagement so that the customer records in the two systems are synchronized. See the [Customer Engagement Customer Integration](#) for more information.

For a new customer: The system places the cursor in the [Name](#) field when you select Create on the [Select Customer Sold To For Order Screen](#) to enter an order for a new customer. The customer name and address fields are blank. The system assigns the next available Sold-to customer number to this new customer and files the customer's name and address information under this number in the Sold-to Customer table.

Search information: If you searched on postal code, name, company, or any combination of these fields before selecting Create to create a new customer, your most recent entry(ies) default into the appropriate fields. Additionally, if your search included the postal code, the related city, state, and country also default.

What to complete?

- [Name](#) or [Cmp \(Company\)](#)
- [Street](#)
- [Postal](#)
- [City](#)
- [State](#)
- [Cnty \(Country\)](#)

Making changes: If you change any of the shipping address information on the order after you have begun to enter additional information, including any items, the order might need to be repriced and the tax recalculated. This situation might occur if you use tax-inclusive pricing and VAT, because a change in address may change whether the order is subject to VAT. In tax-inclusive pricing, you do not accumulate tax in the [Tax](#) bucket on the order, instead, you charge a higher price for the item and add VAT as a hidden tax on the order detail line.

If the customer has a tax exemption at the state level, you also need to clear the tax-related fields in order to prompt the system to recalculate the tax on the order based on the new shipping address. See [Working with Customer Tax Status](#) for an overview.

Field	Description
Name	5 fields are available for you to enter the customer's full name: Prefix A title that belongs before the customer's name, such as "Mrs." or "Dr." <i>Alphanumeric, 3 positions; optional.</i> First Name The customer's first name. <i>Alphanumeric, 15 positions; optional.</i> Initial The initial of the customer's middle name. <i>Alphanumeric, 1 position; optional.</i> Last Name The customer's last name. If you entered a customer last name at a scan screen before selecting Create to create a new customer, this information defaults; but you can override it. <i>Alphanumeric, 25 positions; required if Company has not been entered.</i> Suffix An addition to the customer's full name, such as "M.D.", "Fr.", or "III." <i>Alphanumeric, 3 positions; optional.</i>
Cmp (Company)	The name of the company placing the order. If you entered a company name at a scan screen before selecting Create to create a new customer, this information defaults; but you can override it. <i>Alphanumeric, 30 positions; required if Last name is not entered.</i>
Attn (Attention)	The name of the person who should receive this order at the shipping destination. <i>Alphanumeric, 30 positions; optional.</i>

Field	Description
Street	The customer's street address. This is the primary delivery address. Shipping to a Post Office Box To ship to a Post Office Box, enter POST OFFICE BOX, POST BOX, or any variation of PO BOX (with or without spaces or non-alphabet characters, such as P.O. BOX), and the box number in the customer's street address. During order processing, the system validates that the carrier can ship to a post office box (as defined in the Ship Via table). Example: Enter P.O. Box 9999 in the <i>Street</i> field to indicate delivery to a post office box instead of a home or company address.

 Note:

If you type POST OFFICE BOX, POST BOX, or any variation of PO BOX in the customer's street address during order entry or through the Order API, the system automatically selects the *PO box* field for the customer. However, if you remove this text from the customer's street address, the system does not automatically deselect the *PO box* flag.

Expanded Address

A plus sign (+) appears next to the word *Street* if there is additional information in the third or fourth address lines for the customer (however, the plus sign does not appear if there is an additional second address line only). Use the [Expand Name/Address Screen](#) to complete 3 additional address fields; for example, to enter international addresses.

Alphanumeric, 32 positions; required.

Apt

The customer's apartment, suite, rural route or floor number. Use this field to identify the address further. This information prints next to the primary street address on labels.

To enter an apartment or suite address:

1. Enter APT to indicate an apartment or STE to indicate a suite.
2. Insert a space.
3. Enter the number of the apartment or suite, such as: APT 4 or STE 1164A.

Alphanumeric, 10 positions; optional.

M/F

This code indicates the customer's gender. Gender codes are defined in the Profile Data table, which you use to define other demographic information as well.

Alphanumeric, 1 position; optional.

Field	Description
Postal	The postal or zip code for this customer. If you entered a postal at a scan screen before selecting Create to create a new customer, this information defaults, but you can override it. Required? A postal code is required only if the <i>Require postal code?</i> flag for the country is selected; see Setting Up the Country Table (WCTY). Default city and state? If the system control value Use Zip/City/State Defaulting? (B13) is selected, you can enter just the postal code to have the system default the associated city and state. Postal code validation: If a postal code is required, it is validated against the Zip/City/State (Postal Code) table; see Setting Up the Zip/City/State (Postal Code) Table (WZIP). Tax rates: The Postal Code table includes valid postal code/city/state combinations, and may also contain tax rates. You can purchase a listing of the valid combinations from your post office or you can enter each postal code/city/state combination manually. SCF/ship via validation: If you enter a postal code and the <i>Perform ship via edit?</i> flag for the country is selected, the system validates the SCF/ship via combination against the SCF Ship Via table when you complete the order; see Working with SCF/Ship Via Values (WSHV). <i>Alphanumeric, 10 positions; required or optional based on country.</i>
City	The city where the customer lives or receives mail or shipments. If you entered a postal code at a scan screen before selecting Create to create a new customer, the related city defaults; but you can override it. <i>Alphanumeric, 25 positions; required.</i>
State	The state or province where the customer resides or receives mail or shipments. If you entered a postal code at a scan screen before selecting Create to create a new customer, the related state defaults; but you can override it. Defined where? State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Required? A state is required only if the <i>Require state?</i> flag for country is selected. See Setting Up the Country Table (WCTY). SCF validation: If the <i>Require postal?</i> flag for the country is selected, the system validates that the state you enter is assigned to the SCF associated with the postal code. See Working with SCF Codes (WSCF) for background. <i>Alphanumeric, 2 positions; required or optional based on country.</i>
Cnty (Country)	The code for the customer's country. Country codes are defined in and validated against the Country table. You can define a Default Country for Customer Address (B17) in the System Control table or specify one at the Default Values for Orders screen screen. If you entered a postal code at a scan screen before selecting Create to create a new customer, the related country defaults; but you can override it. <i>Alphanumeric, 3 positions; required.</i>

Field	Description
Email	The email address for this order. Order-level email address: The email address defaults from the customer's primary email address. A plus sign (+) indicates that there are additional email addresses on record for the customer. When you press Enter, the system adds the order-level email address to the Customer Sold To Email Address table, if it is not already there. See Working with an Order-Level Email Address for more information. Recipient or gift order: The email address is associated with the customer placing the order. To work with the email address for the order recipient, you must advance to the Expand Name/Address Screen. Email format validation: See Email Address Validation for information on how the system verifies that your entry is formatted correctly. Email notifications: This field must contain an email address for the system to send the customer automatic email notifications, such as backorder or soldout notifications. See When Does the System Generate an Email Notification? Fraud checking: The order goes on EO hold if this email address matches an email address in the Miscellaneous Fraud table; see Working with Miscellaneous Frauds (WMFF). <i>Alphanumeric, 50 positions; optional.</i>

Field	Description
OptIn	Indicates the preferred method of correspondence. Valid values are: • O1 (All) = Email is the preferred method of correspondence. • O2 (Order) = Use email for order-related correspondence only; generate a document for other correspondence. • O3 (None) = Do not use email for any correspondence; generate a document instead. • O4 (Don't Ask) = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified. Defaults: • If the email address defaults from the sold-to customer, the opt-in/out setting also defaults from the customer. Normally, the opt-in/out setting for the customer and the setting for the matching record in the Customer Sold To Email table are the same, but if they are not, the opt-in/out setting defaults from the Customer Sold To Email table. • If no email address defaults, or if this is a new customer, this value defaults from the Default Opt In/Opt Out Flag (G97) system control value. You can override the default.

 Note:

The above values use the letter O, not the number 0 (zero).

The system updates this field when you change the setting of the *Opt in/Opt out* value at any other screen, such as customer maintenance or order maintenance.

When you update this setting: The opt-in/out setting is not stored on the order itself. When you change the opt-in/out setting here, the system updates the opt-in/out setting for the email address used on the order in the Customer Sold To Email Address table. If the order-level email address is also the customer's primary email address, the system also updates the customer's default opt-in/out setting. See [Email Address Updates through Interactive Order Entry](#) for more information.

Recipient or gift order: The opt-in/out setting is associated with the customer placing the order. To work with the opt-in/out setting for the order recipient, you must advance to the [Expand Name/Address Screen](#).

Email notifications: See *When Does the System Generate an Email Notification?* for an overview.

Outbound email API: The opt in/opt out settings controls the generation of the *Outbound Email XML Message (CWEmailOut)* using the same logic as the generation of outbound emails. See *Outbound Email API* for an overview.

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

Field	Description
Phone numbers	There are 2 different sets of fields for the customer's daytime and evening or third (fax or mobile) phone numbers. These fields are based on the following system control values: • The Phone Numbers (D15) system control value determines whether the third phone number (fax or mobile) or the evening phone number is listed after the day phone number. • If the Phone Numbers (D15) system control value is set to DAY/FAX, the Third Phone Number Type (L53) system control value determines whether the third phone number is labeled the <i>Fax</i> or <i>Mobile</i> number. See the Phone Numbers (D15) and Third Phone Number Type (L53) system control values for more information. One, but not both, of these fields is a required field if you set the system control value Require Phone Number in Order Entry/Order Maintenance (H01) to Y. Phone number format: You can define a telephone number format to map to the phone numbers operators enter into the system. Telephone number formats are defined by arranging numbers and special characters such as hyphens and parenthesis in the same order and position as the numbers in a phone number would display. When an operator enters a phone number, the system compares the number of numeric characters in the phone number with the telephone number formats you have defined. In order to match a format, the phone number must have the same number of numeric positions as a telephone number format. If the system cannot find a match, the phone number does not map to a telephone number format and is displayed as it was entered by the operator. Example: Telephone Number Format An operator enters a phone number containing 10 numbers: 5085550100 The telephone number format used in the United States to represent an area code, local exchange and local phone number is: (508) 555-0100. When an operator enters a phone number containing 10 numbers (as in the example), the phone number is displayed so that the first 3 positions are in parenthesis and a hyphen is between the sixth and seventh numbers, regardless of how the operator entered it into the system. If an operator enters a phone number containing 6 numbers, for example 5550100 and no format exists for 6 numbers, the phone number would display as it was entered (5550100). See Setting Up the Country Table (WCTY). <i>Alphanumeric, one 14-position (phone number) and one 4-position (phone extension); one of the two fields is required if system control value Require Phone Number in Order Entry/Order Maintenance is selected; otherwise, optional.</i>

Field	Description
Delivery	Identifies a business (commercial) or residential address. Carriers that use different business or consumer rate tables (such as UPS) use this value. Valid values are: • Business = Business rate table determines shipping charges. • Residential = Residential rate table determines shipping charges. • No Distinction = This is not a valid value for UPS shippers. The system uses this logic to default a delivery code to a customer address on an order: • The system defaults the delivery code defined for the postal code on the address. • If a delivery code has not been defined for the postal code on the address, the system defaults the delivery code defined in the Customer table. • If a delivery code has not been defined in the Customer table, the system defaults the delivery code defined in the Default Delivery Code for New Order Entry Customers (D13) system control value. <i>Required.</i>
Class (customer class)	A code that categorizes customers at a high level for reporting purposes. You can use customer class codes to: • send offers to a limited group of customers • restrict item sales to a group of customers • bypass normal item reservation • determine whether to prompt for user-defined fields in order entry You can define a Default Customer Class in Order Entry (D63) to assign to all customers you create through order entry. Required? The Require Customer Class (H85) system control value defines whether this field is required. Secured? The Maintenance of Customer Class Field (B07) secured feature defines whether you can enter or maintain the customer class field at this screen.

 Note:

If the [Require Customer Class \(H85\)](#) is selected and the customer does not have a customer class code assigned, a user who does not have authority based on the Maintenance of Customer Class Field (B07) secured feature will not be able to enter an order.

See [Setting Up the Customer Class Table \(WCCL\)](#) on working with customer classes.

Numeric, 2 positions; optional or required depending on system control value.

Field	Description
Rent	Indicates whether to rent this customer's name to other companies. - selected = Rent this name. - unselected = Do not rent this name.
Mail	Indicates whether to send the customer mailings from your company. You can define a default value in the System Control table. - selected = Send mail to this customer. - unselected = Do not send mail to this customer.
Currency	The currency defined for the offer associated with the source code. The currency is included on the screen after you enter a source code on the order header.

 Note:

Displayed only if you have the [Multi Currency by Offer \(E03\)](#) field in the System Control table selected.

Associate (Associate customer)

Alphanumeric, 3 positions; display-only.

Indicates whether the customer is eligible for associate pricing. The associate price is a discounted price for an item, as defined in the *Associate price* field for the Item/Offer or SKU/Offer.

Defaults to selected if the customer is identified as an associate customer.

The system updates the customer automatically if you change this setting.

Valid values are:

- selected = The customer receives the associate price for each item ordered.
- unselected (Default) = The customer is not an associate customer and receives the regular item price for each item ordered.

Secured Feature

The *Change Associate Customer Flag (B10)* secured feature controls whether you can change this setting; if you prohibit access to this feature, an error message indicates if you try to change the value:
Not authorized to change Associate Customer.

Adding Order Information

Use the Order Information fields on the [Work with Order Screen](#) to define or verify how you received the order, to identify how the order will be delivered, and to specify whether the customer is eligible for any discounts or tax exemptions. The Order Information fields are located in the lower portion of the screen underneath the dashed line. The order information fields are:

- [Source](#)
- [Via](#)
- [Disc %](#)
- [Salesrep](#)

- [Pty \(Priority\)](#)
- [Hld Rsn](#)
- [Arrival date](#)
- [Cancel date](#)
- [Canc B/O \(Automatically cancel backorders\)](#)
- [Gift](#)
- [PO#](#)
- [Tax code](#)
- [Tax identification](#)
- [Whs \(Warehouse\)](#)
- [Est frt \(Estimated freight charge\)](#)

Defaults: Defaults may be loaded to various fields, based on values established in the System Control table or defaults entered at the [Default Values for Orders screen](#). You can override these values if needed.

What to complete?

- [Source](#)
- [Via](#)

Field	Description
Source	A code that identifies a segment of your customer base or a rented list to whom you mail a catalog. The source code helps you to track the origin of the customer's order. The source code typically prints on the catalog mailing label (if your company includes this information when you print labels). Each order must include a valid source code during Order Entry, either one that the customer provides (a "known" source code from a catalog mailing) or a generic source code when you cannot trace the origin of the order from a specific catalog (an "unknown" source code). The source code controls how shipping is calculated and items are priced, and whether the order is eligible for any discounts. Defaulting - The source code may default from the <i>Current source</i> field or from mail history for the Sold To Customer depending on the settings of the Use Default Current Source Code (C46) and Load Source from Mailing History (D20) system control values. - You can use the Source Code Auto Retrieval Value (H82) to automatically retrieve the correct source code based on the most recent mailing to the customer, or to default a source code if the actual code is unknown. - If you enter a source code at the Select Customer Sold To For Order Screen, the system defaults this source code to the order. Default Unknown Source Code If the order header source code matches the source code in the Default Unknown Source Code (I58) system control value, the system updates the source code on the order header to the source code associated with the offer on the first order detail line; see Default Unknown Source Code Logic. Prompting for a source code You can prompt on this field to obtain a list of current source codes. Only source codes with a <i>Y</i> in the <i>Display in O/E</i> field in the Source Code table are listed. You can also use the Source Code Auto Retrieval Value (H82) to retrieve the correct source code based on the most recent mailing to the customer, or to default a source code if the actual code is unknown. Currency of source code If you take orders in multiple currencies (the Multi Currency by Offer (E03) system control value is selected), the currency defined for the offer associated with the source code will display in the <i>Currency</i> field after you enter the source code. Restricted source codes During Order Entry, you must use unrestricted source codes, which means that the <i>Restricted</i> field in the Source Code is unselected. A source code might be flagged as "restricted" when: - The source code is obsolete; no new orders can use the source code. - The source code includes errors or was created by mistake. Initially, all new source codes have an unrestricted status. During Offer Initialization, however, you might restrict all source codes associated with a particular offer. Capturing the Source Code

Field	Description
	The system writes the source code used by a new customer to the <i>Original source</i> field for the customer. If the Update Original Source Code for Recipient Customers (F90) system control value is selected, the system writes the source code defined for the sold to customer to the Original source code field for a recipient customer. The system may also update the source code to the Current source code field for a new or existing customer, depending on the setting of the Update of Current Source Code in Customer File (D08) field in the System Control table. Bypass Credit Checking If the <i>Bypass credit check</i> field for the source code is selected, the system does not perform credit checking for this order and writes a message to order transaction history indicating credit checking was bypassed. Entering Customer Warranty Information If the <i>Warranty required</i> field for the source code is selected, the system automatically advances you to the Customer Warranty Information screen where you can enter warranty information for a warranty product on the order. See Displaying More Options in OIOM. Entity History The system captures entity-level history based on the source code on the order header if the Track Customer History at Entity Level (F89) system control value is selected. More information on source codes: Source codes are defined in and validated against the Source Code table. See Working with Source Codes (WSRC). <i>Alphanumeric, 9 positions; required.</i>

Field	Description
Via	A code for the shipper to deliver this order to the customer. Ship via codes are defined in and validated against the Ship Via table; see Working with Ship Via Codes (WVIA). Additionally, ship via codes are validated against the SCF/Ship Via table, which ties together shippers and geographic locations. You need to set up valid carriers for each SCF prior to Order Entry. See Working with SCF/Ship Via Values (WSHV). Ship Via Defaults A default value is loaded in this field if you entered a default on the Default Values for Orders screen or in the Default Ship Via (A77) system control value. In addition, there are several ways the system can override the shipper specified on the order with another shipper; see Ship Via Override Hierarchy for a complete list and the hierarchy in which the ship via overrides take precedence. Reviewing eligible ship vias and optionally selecting an override You can prompt on this field to advance to the Valid Ship Vias for Window, where you can review valid ship vias for the order, including their overall shipping charges and expected delivery dates; optionally, you can select an override ship via. Prompting and validation for countries where postal code is optional: • If the customer's address does not include a postal code (possible if the country's <i>Require postal code?</i> flag is unselected), the Valid Ship Vias for Window displays all valid SCF/ship via combinations based on the default SCF of #. Setting up SCF/ship via records using the default of # enables you to specify valid ship vias for an address without a postal code. • If the country's <i>Perform ship via edit?</i> flag is selected, then the system validates the ship via against the SCF/ship via table. To perform this validation for an address that does not include a postal code, the system uses the default SCF of #. See Setting Up the Country Table (WCTY). Item Ship Via Overrides If ship via overrides exist in the Item Ship Via Override table for an item on the order, the system evaluates the ship via on the order header to determine if the ship via is eligible to ship the item. If the ship via on the order header is not defined in the Item Ship Via Override table for the item on the order, you advance to the Ship Via Overrides for Item Window, requesting you to select an eligible shipper to assign to the item on the order line. See Working with Item Ship Via Overrides for more information on defining eligible shippers for an item. Express Bill Ship Vias You can use an express bill shipper for orders in which an item has already been taken from the warehouse without first entering an order. An express ship via is designated by an Express Bill in the <i>Billing code</i> field for the shipper. When you enter an express billed order, the Enter Location pop-up window opens after you enter the item. Here, you must identify the warehouse and location from which the item was removed. The system defaults the warehouse and primary location defined in the Item table, however, if the Retail Order Defaults (F59) system control

Field	Description
	value is selected, the system defaults the warehouse from the Retail warehouse field in the Order Type table and defaults the location from the <i>Auto restock location</i> field for the warehouse that defaulted. When you express-bill an order: • The system performs an inventory transaction to reduce the quantity on-hand in the location. • The system does not create a pre-generated pick for the item so that you do not reduce inventory twice. • No shipments occur. • If you enter a credit card payment method, you must manually authorize the card (enter an authorization number and authorization date for the payment method) or the order must be eligible for online authorization; see Performing Online Credit Card Authorizations. If the order is not eligible for online authorization and you do not enter an authorization number and authorization date, the screen displays an error message when you try to accept the order: Auth # & Date required for credit card on express order. Click on pay methods tab & enter.

 Note:

It is possible to exceed the entire available quantity of an item when you express-bill an order if you enter more than one order line for the same item. To avoid this situation, enter only one order line for each item on an express-billed order.

Since you cannot enter the Authorization Request ID at this screen, Oracle recommends that you instead use the Add Authorization option from the Order Summary page in Modern View to apply a manual authorization.

You can change an item on an order to express bill by entering an express bill code in the *Ship via* field on the [Work with Order Lines Screen \(Adding Items to the Order\)](#). When you express bill an item, the system does not create a pre-generated pick and no shipments occur.

An error message indicates if you try to change an item on an express bill order to a regular ship via:

Ship Via must be an Express Bill.

Numeric, 2 positions; required.

Field	Description
Disc %	A flat discount percentage applied to discountable merchandise only (the Discountable field for the item is selected). A discount percentage defaults here if there is one specified for the source code or a standard or loyalty customer membership. The discount entered here applies only to the current shipping address on the order. You must reenter the discount for each recipient on the order. The system checks the user's feature authority in the <i>Discount percentage access</i> field in the Secured Features table and issues a message if the user is not authorized to take discounts on orders: You are not authorized to use discount %. The system also checks the Order Discount Percentage Limit (D16) system control value when you enter a discount here and issues a message if the discount exceeds this value: Discount % (xxx.xx) is greater than allowable limit. <i>Numeric, 5 positions with a 2-place decimal; optional.</i>

Field	Description
Salesrep	The person who is credited for making the sale. This is the person who is responsible for obtaining the customer's order; this may not be the same person who enters the order on the system. The salesrep# is used for sales and commission reporting. Sales representatives are defined in and validated against the Salesman table. See Working with Sales Representatives (WSLS). The system validates that the <i>Active</i> flag for the salesman on the order is selected; otherwise, an error message displays: <i>Salesman is not active</i>. The salesrep number defaults from: - the customer table, if you have entered a valid value in the Salesrep # (Sales representative number) field in the customer table, or, if no Salesrep# is associated with the customer, - the Default Values for Orders screen, if the <i>Salesrep #</i> field on the screen is populated (See Setting a Default Salesrep Number); this value on the Default Values for Orders screen may default from system control value Default Salesrep Number (E86). If you prompt on this field, the system displays the Select Salesrep window where you can review and select a valid salesrep. The window indicates whether the salesrep is active and if a home store has been assigned to the salesrep.

 Note:

- If you override the Salesrep number on the Work with Order screen, and then update customer information, the salesrep number associated with the customer, if the customer has an associated salesrep number, will again default.
- If a *Home Store* is defined for the salesrep number, the system does NOT default this store to the *Sales Rep Store* field on the [Work with Order Ship to Properties Screen](#).

Numeric, 7 positions; optional.

Field	Description
Pty (Priority)	Used by the Evaluate Backorders program to match items to backorders. A value defaults to this field if a priority was entered in the B/O priority (Backorder priority) field for the source code; and the header-level value, in turn, defaults to the Priority field on the order detail line. The Auto Update Order Priority (G45) system control value controls whether the system automatically updates the priority of the order to 9 (highest priority) when you enter an override to the default Arrival date in order entry or order maintenance. If this system control value is selected, the system automatically updates the priority to 9 when you enter an override to the <i>Arrival date</i> on the order header or order detail screen. If this system control value is unselected, the system does not update the priority of the order when you enter an override to the <i>Arrival date</i>. Immediate Reservation If you use Immediate Reservation, this value determines the sequence in which orders with backordered items receive inventory. The Evaluate Backorders program uses the priority to determine which backorders receive stock first. <i>Numeric, 1 position; optional.</i>
Hld Rsn	A code to place an order on hold for any user-defined reason. Hold reason codes are defined in and validated against the Hold Reason table. See Establishing Order Hold Reason Codes (WOHR). The system reserves inventory for orders with a hold reason code; however, the order is not eligible for pick slip preparation. You must release orders on any type of hold through Releasing Held Orders. <i>Alphanumeric, 2 positions; optional.</i>

Field	Description
Arrival date	The date when the customer wants to receive this order. Initially, the arrival date is set to the current date; however, you can enter some future date to ship the order at a later date. Alternatively, you can leave this field blank and enter an arrival date for selected items.

 Note:

This screen prevents you from entering an arrival date earlier than the order date; however, the system does not prevent you from setting the arrival date earlier than the order date when you create the order through the order API or submit the order to the batch edit. Also, the system does not prevent you from entering an arrival date for an order line that is earlier than the order date.

The Auto Update Order Priority (G45) system control value controls whether entering an override to the *Arrival date* in order entry or order maintenance updates the priority of the order to 9 (highest priority).

- If this system control value is selected, the system automatically updates the priority to 9 when you enter an override to the *Arrival date* on the order header or order detail screen.
- If this system control value is unselected, the system does not update the priority of the order when you enter an override to the *Arrival date*.

The arrival date controls:

- Inventory reservation.
- Pick slip preparation; see [Selecting Order Lines for Pick Slip Preparation](#).

Influence on Reservation

The arrival date on the order controls whether inventory is reserved for each order detail line. The system uses this calculation:

```
arrival date - reservation lead days (B27) =  
reservation date
```

The system will not reserve inventory if the system-calculated date is greater than today's date. This is considered a future order. The system identifies each item on the order as a future order and assigns a backorder status to each item.

You can run the [Evaluate Future Orders](#) periodic function each evening to evaluate each item marked as a "future order." The system reruns the arrival date calculation. The system reserves the required inventory based on the order date if the system-calculated date is less than or equal to today's date.

Influence on Pre-Generated Picks

The arrival date on the order controls whether the system creates pre-generated picks for the order. The system uses this calculation:

Field	Description
	Arrival Date from Order Line (or Order Ship To) - (Pick Processing Days (B37) + Ship Via Lead Days in WSHV) < or = Today's Date The system creates a pre-generated pick for the order line if this system-calculated date is less than or equal to today's date; otherwise, the system does not create a pre-generated pick for the order line until the date is within the allotted time frame. See Selecting Order Lines for Pick Slip Preparation. <i>Numeric, 6 positions; required.</i>
Cancel date	The last date on which the customer will accept receipt of this order. Leave this field blank if there is no "deadline" for delivery. The system uses this calculation: Cancel date - Lead days (System Control table) - Transfer days (Warehouse/Drop Point table) - Lead days (SCF/Ship Via table) - Date to stop reserving stock Order Cancellation List Any items that have not shipped before the cancellation date are printed on the Order Cancellation List along with the customer's name and phone number. Customer Service uses this list to contact each customer to see if the deadline can be extended. If not, Customer Service must use Order Maintenance to cancel the order. Influence on Pre-Generated Picks The cancel date on the order controls whether the system creates pre-generated picks for the order. The system uses this calculation: Cancel Date > Today's Date + Pick Processing Days (B37) + Ship Via Lead Days in WSHV The system creates a pre-generated pick for the order line if the cancel date is greater than this system-calculated date; otherwise, the system does not create a pre-generated pick for the order line. See Selecting Order Lines for Pick Slip Preparation. <i>Numeric, 6 positions; optional.</i>
Canc B/O (Automatically cancel backorders)	Indicates whether the system will cancel any backordered lines automatically after the first shipment on the order. Unshipped lines are canceled during Confirmation. Valid values are: • selected = Items cannot be backordered. • unselected (Default) = Items can be backordered. If this field is selected, any open line on an order will be canceled during billing using the Auto Soldout Cancel Reason (C20), provided this system control value specifies a valid cancel reason code.

Field	Description
Gift	Indicates whether the order is a gift order. Valid values are: • selected = The order is a gift order. • unselected = The order is not a gift order. If the order is a gift order: • You can select Sold To/Recipient to enter the recipient's shipping address; see Adding a Recipient Order in Order Entry. • No pricing information prints on the pick slip. • The buyer receives a gift acknowledgment card to confirm delivery of the gift. May default to Y or N depending on the value in the Default "Gift Order" Flag (D14) system control value. If this field is set to default to Y, the sold-to customer information is cleared after you enter the source code for the order. Also, you can select Accept/Add Recip to enter a recipient order, the <i>Gift</i> field will be selected automatically for each recipient (but can be overridden).
PO#	The customer's purchase order number. <i>Alphanumeric, 15 positions; optional.</i>

Field	Description
Tax code	This code determines whether the customer's purchases are taxed, and if so, how to calculate the tax. Defaults to the tax status previously defined for an existing customer and defaults to N for a new customer. When you enter the customer's name and address, the system changes the tax code to T if the customer is subject to tax.

 Note:

The system ignores the tax code if you use an external tax system to calculate tax.

The system uses these sources to calculate tax on an order:

- [Tax Included in Price \(E70\)](#) system control value and other system control values
- Country table (see [Setting Up the Country Table \(WCTY\)](#))
- SCF table (see [Working with SCF/Ship Via Values \(WSHV\)](#))
- Postal Code table (see [Setting Up the Zip/City/State \(Postal Code\) Table \(WZIP\)](#))
- Customer Sold To table and Customer Tax table (see [Working with Customer Tax Status](#))
- Item and SKU tables; Item Tax Exemption table and GST Tax Exemption Status table (see [Working with Item Tax Exemptions \(WITX\)](#) and [Working with GST Tax Exemption Status \(MGTX\)](#))
- Additional Charge Code table (see [Establishing Additional Charge Codes \(WADC\)](#))

The information that the system gathers for tax calculation purposes includes tax rates, calculation methods for the Canadian GST and PST taxes, and whether to tax freight and/or handling.

You can set up a tax exemption as a default for a customer, or exemptions in particular states or provinces.

If you change the shipping address: Whenever you make any change to the shipping address on the order, you should clear the *Tax code* field and the *Resale/Exempt#* field. Clearing these fields allows the correct information to default into these fields based on the new destination address. See [Working with Customer Tax Status](#) for a discussion of how a customer's tax information defaults in order entry.

Valid values are:

- Taxable = Indicates that the customer is subject to all regular taxes. If the customer resides in Canada, the customer is subject to both GST and PST.
- Non-Taxable = The system determines the customer's tax status in order entry based on whether you enter a *Resale/Exempt #* and on the shipping address. See [Working with Customer Tax Status](#) for an overview.
- Resale = Indicates that the customer is a reseller. A reseller is a person or company who purchases goods to sell to someone else. A reseller certificate number is required in the *Tax identification* field. The system does not calculate standard tax (in the *Tax* bucket) or VAT, if applicable, on the order.
- Exempt = Indicates that the customer is considered tax-exempt. A tax-exempt certificate number is required in the *Tax*

Field	Description
	<i>identification</i> field. The system does not calculate standard tax (in the <i>Tax</i> bucket) or VAT, if applicable, on the order. • GST Only = Indicates that the customer is a Canadian customer who is subject to the Goods and Services tax (GST) on purchases only. GST is a federal tax. The System Control table defines the default GST rate; however, an override GST rate might exist for the postal code or SCF. • PST Only = Indicates that the customer is a Canadian customer who is subject to the Provincial Services tax (PST) on purchases only. The <i>Tax identification</i> is required for a tax code of Resale or Exempt. <i>Required.</i>
Tax identification	The customer's tax identification code, typically the resale or exempt certificate number assigned to a customer who is identified as tax exempt (E) or as a reseller (R); otherwise, the tax identification number does not control taxability. Any combination of letters, numbers, or special characters is accepted. The tax identification code entered here is saved on the order, but does not update the customer record. If a customer has a VAT exemption number, the tax code will default to Exempt and the words VAT EXEMPT will default in this field for any order subject to VAT. You cannot override a VAT exemption and make the order taxable. See Working with Customer Tax Status for a discussion of how tax information defaults in order entry. <i>Alphanumeric, 30 positions; required if customer is defined as tax exempt or as a reseller; otherwise, optional.</i>

Field	Description
Whs (Warehouse)	The warehouse used to ship the order. Leave this field blank if you want the system to determine which warehouse to use; otherwise, enter a warehouse code. The warehouse code you enter here overrides all warehouse codes except those entered for an individual order line, using the Add Line option. Warehouse codes are defined in and validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS). Warehouse Defaults The system uses the following hierarchy to default a warehouse to the order header. 1. Default the <i>Reserve warehouse</i> defined for the shipping address on the order. • This is the <i>Reserve warehouse</i> defined for the permanent ship to customer on the order. • If a permanent ship to customer does not exist on the order, this is the <i>Reserve warehouse</i> defined for the recipient sold to customer on the order. • If a recipient sold to customer does not exist on the order, this is the <i>Reserve warehouse</i> defined for the sold to customer on the order. 2. If the Reserve from Non-Allocatable Warehouse (J25) system control value is <i>selected</i>, default the non-allocatable warehouse defined for the order type on the order. See Non-Allocatable Warehouse Reservation Processing During Order Entry for an overview.

 Note:

If you change the order type on the order, the system defaults the non-allocatable warehouse defined for the new order type. If a non-allocatable warehouse is not defined for the new order type, the system removes the warehouse from the order header.

3. If the Reserve from Non-Allocatable Warehouse (J25) system control value is *unselected* or a non-allocatable warehouse is not defined for the order type on the order, leave the *Warehouse* field on the order header blank.

 Note:

If you change the order type on the order, the system defaults the non-allocatable warehouse defined for the new order type. If a non-allocatable warehouse is not defined for the new order type, the system retains the

Field	Description

 warehouse default that currently exists on the order header.

Warehouse Reservation Hierarchy

The system uses the following hierarchy to determine the warehouse where an order will ship from.

1. Warehouse Defined on Order Line: If you have defined a warehouse code for an individual order line, the system reserves the item from this warehouse.
2. Warehouse Defined on Order Header: If you have defined a warehouse code on the order header, the system reserves the items on the order from this warehouse, unless a different warehouse is defined for an individual order line.
3. Warehouse List: If you have not entered a warehouse code for an individual order line or a warehouse code on the order header, the system will look for a warehouse list for the SCF of the order ship to address, if the Ship Complete from 1 Warehouse (B16) system control value is selected.
4. Item's Primary Warehouse: If no reserve warehouse can be assigned based on individual order lines, a warehouse code entered on the order header, or a warehouse list, the system will reserve the item in the warehouse defined for the item in the Item table.

Updating the Warehouse Defined for the Order

If you update the warehouse defined on the order header, the system:

- Removes any existing inventory reservations for the order lines on the order.
- Attempts to reserve the items on the order in the new warehouse specified. If the item is not available in the warehouse specified, the system assigns this warehouse as the backorder warehouse for the unreserved quantity of the item on the order line.

Reserving Against a Non-Allocatable Warehouse

If the Reserve from Non-Allocatable Warehouse (J25) system control value is selected, the system allows you to reserve inventory against a non-allocatable warehouse. You can define a non-allocatable warehouse in the *Reserve warehouse* field for the order type; any orders entered for this order type default the non-allocatable warehouse to the *Warehouse* field on the order and reserves against the non-allocatable warehouse. If the item is not in stock, the system backorders the item against the non-allocatable warehouse. See [Non-Allocatable Warehouse Reservation Processing During Order Entry](#) for more information.

Numeric, 3 positions; optional.

Field	Description
Est frt (Estimated freight charge)	Your “best guess” of the freight charges on the order. Only enter a value here if using the actual freight method. You can tell the customer what the estimated freight charge for the order is; however, the true freight charge will be based on the actual weight of items on the order. Actual (billing amount) freight method You can enter an estimated freight charge when using the actual freight method (as designated by an Actual Bill Amt in the Freight method field of the source code). This is an order-level freight method that uses the total weight of all the items on the order to determine what the shipping charges will be on the order. The freight method being used on the order is transparent to your Order Entry operators; you must train your operators to enter estimated freight charges only for specific source codes. The actual freight charge is determined during Confirmation or Billing by one of these methods: • Weighing the package and using the system- calculated the freight charge • Entering the freight charge manually The estimated freight charge is not included in the order totals, so the <i>Fr</i>t (freight) field will be blank (unless there is a freight override) until you determine the actual freight charge.

 Note:

You can enter an estimated freight charge up to 99999.99. You must type the decimal point when entering the estimated freight.

Numeric, 13 positions with a 2-place decimal; optional.

Reviewing Order Totals

The system accumulates the current charges on the order in the Order Totals fields at the bottom of the [Work with Order Screen](#):

- [Merch](#) (Merchandise)
- [Frt](#) (Freight)
- [Frt+](#) (Additional freight charges)
- [Tax](#)
- [Hnd](#) (Handling charge)
- [Chg](#) (Additional charges)
- [Total](#) (Order total)

The individual charges on the order are summarized in the *Total* field, enabling you to determine quickly what the customer is charged for items ordered, tax, freight, and additional charges, either by charge type or as a grand total.

Initially, the Order Totals fields are blank; however, the system updates the Order Totals fields as you add items to the order or as you attach additional charges.

You cannot enter information in these fields.

How do Order Totals relate to the current order? The Order Totals at the bottom of the screen relate to the current order only. This means that, although the customer may have placed several orders at the same time that will ship to different addresses, the Order Totals shown relate just to one order.

Select Summary to review the Order Totals across all recipient orders related to this order. These totals represent a summary of all charges for all shipping addresses; this is the amount that the customer owes for the initial order and all additional recipient orders. A recipient order is an order that is placed by and paid by a customer, but will ship to another address.

Field	Description
Merch (Merchandise)	The total value of merchandise on this order. This does not include freight, additional charges, tax (except for hidden tax; see the Tax field), duty, handling, or sold out items. The value in the <i>Merch</i> field is the grand total of the item price on the line multiplied by the quantity ordered. Order-level discounts Select Reprice when you finish entering the order to calculate any end-of-order pricing discounts, including promotional pricing. Line-level discounts The system calculates any line-level discounts (such as the Disc %) line-by-line, as you enter each item. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>

Field	Description
Frt (Freight)	The total charge for shipping this order. The system performs this calculation based on the freight method defined for the source code on the order. This total may depend on the quantity or weight of items ordered or on the dollar value of the order as a whole. If the system calculates freight as a percentage of the merchandise charges, there might be a penny variation in total freight amount due to rounding differences. You can also define a freight override for the order ship to on the Work with Order Ship to Properties Screen. Freight Methods Working with Source Codes (WSRC) discusses each freight method and freight calculation. Additional Charges Does not include any additional charges associated with shipping this item (see the Frt+ (Additional freight charges) field for these totals). Service and Weight Charges by Ship Via Includes any service charges by ship via or order weight charges by ship via. See Working with Ship Via Codes (WVIA). When the Freight Field is Blank - The <i>Frt</i> field is blank if the Calc freight (Calculate freight) field is unselected to indicate that freight will not be calculated for this order. - The system calculates freight by order weight during repricing, the initial and final order accept, and when you select to change the last line on the order if you do not change its order quantity. The <i>Freight</i> field on the order does not include order weight freight charges as you add lines to the order; however, the system does display ship via service charges and ship via weight charges immediately. When the system calculates freight by order weight, the system updates the <i>Freight</i> field for the order with the complete freight amount. See Freight by Order Weight Calculation Logic and Examples. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Frt+ (Additional freight charges)	The total dollar amount for additional freight charges on the order, above regular shipping charges. The value in the <i>Frt+</i> field includes the additional freight charges defined for the shipper(s) on the order. For example, the shipper may charge a premium (additional shipping charges) for overnight shipments or Federal Express deliveries. Depending on how the shipper is defined, the customer may be charged additional shipping charges (in the <i>Frt+</i> field) and system-calculated shipping charges (in the <i>Frt</i> field) or just the additional shipping charges. The Add'l freight charge field for the Ship Via defines the additional freight charge. The system adds the additional shipping charge to an order only when the merchandise amount is less than or equal to the value in the <i>\$Limit</i> field for the shipper. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Tax	Tax Included in Price (E70)

Field	Description
Hnd (Handling charge)	The total charge for special handling, gift wrapping or duty. The handling total in the <i>Hnd</i> field is the grand total of the handling charges for each item on the order multiplied by the quantity ordered. Also includes any duty charges on the order. You can review the duty charge for an individual item by selecting Change for an item on the Work with Order Lines Screen (Adding Items to the Order). See Special Handling Overview for more information. Can any item be gift wrapped? The Gift wrap and G/W price (Gift wrap price) fields for the Item/Offer or SKU/Offer control whether an item may be gift wrapped and defines the gift wrapping charge if gift wrapping is allowed. The system adds the special handling charge to the handling totals <i>for each gift wrapped item</i>. Blank if none of the items on the order are personalized or gift wrapped. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>

Field	Description
Chg (Additional charges)	The total extra charges added to the current order. Types of Additional Charges The value in the <i>Chg</i> field is the sum of the additional charges on the order, namely: • An additional service charge defined for the source code, based on the dollar value of merchandise on the order. • An additional service charge defined for the offer, based on the dollar value of merchandise on the order. • An additional shipping charge defined for the Shipper/Item. • A guaranteed service charge defined in the offer. • An additional charge entered manually through Charges. Source code additional charges The system adds an additional charge to the order automatically when service charges exist for the source code. The amount of the additional charge is based on the total merchandise dollar value. See Working with Dollar Chart by Source Code (WDCS). Offer additional charges The system adds an additional charge to the order when service charges exist for the offer, but not for the source code. The amount of the additional charge is based on the total merchandise dollar value. See Working with Dollar Chart by Offer (WDCO). Shipper/item additional charges An additional charge may be defined for an item, depending on the shipper you select to deliver the item. Example: You might set up a special shipper/item for a desk when it will be delivered by Sample Shippers. Usually, Sample Shippers charges \$8.50 to deliver most items, but, because the desk is oversized and heavy, the customer will be charged an extra \$25.00 for delivery. The \$25.00 additional shipping charge will be added to the order automatically in the <i>Chg</i> field when the customer orders the desk and requests delivery through Sample Shippers. See Working with Ship Via Codes (WVIA). Guaranteed service charge A guaranteed service charge will be added automatically to the order when a value exists in the Guaranteed order charge field in the offer and the Excl serv chg (Exclude service charges) field for the source code is unselected. This is a charge required to guarantee that, if the order does not arrive, a replacement order will be shipped immediately while your company investigates the whereabouts of the original shipment. Manually-entered additional charges You can add any type of additional charge to the order by selecting Charges. The Enter Additional Charges Window opens for you to select an additional charge code and specify the additional charge. This allows you to add additional charges to an order at any time. The system displays the additional charge on this window using the value from the applicable <i>Additional charge code</i> field for the Offer. Additional charges and credits are defined in and validated against the Additional Charges table. You can define additional charge or credit codes for any reason, such as a charge for store-restocking

Field	Description
	or import duties or a credit for long-distance telephone charges or postage, etc. See Establishing Additional Charge Codes (WADC). You can limit the total amount of negative additional charges applied to an order by entering a dollar value in the Negative Additional Charge Limit (E49) system control value. You cannot override this dollar limit unless you have authority. Select Charges to review the additional charges on the order. Blank if no additional charges or credits are applied to the order. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Total (Order total)	The sum of all charges on the order, including: merchandise, freight, additional freight, tax, handling, duty, and additional charges. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>

When you complete this screen: Select OK when you complete the [Work with Order Screen](#). The system validates your entries and highlights any fields with errors. You must correct any errors before you can continue entering the order. So far, you have identified the person who is placing the order. Several different things can happen when you select OK and all your information is valid:

- The [Enter User Fields Screen](#) opens for you to capture information for the new customer.
- The [Work with Customer Warranty Information Screen](#) opens if the Warranty required field for the source code on the order header is selected. You can use this screen to enter warranty information for a product on the order.
- You advance to a pop-up window. See [When a Window Opens](#).
- The system places the cursor in the *Name* field; this allows you to:
 - Select any of the function keys listed at the bottom of the screen, *or*
 - Select OK again to advance to the [Work with Order Lines Screen \(Adding Items to the Order\)](#).

Display Duplicate Sold To Window

Duplicate addresses: A window opens if you enter a customer's name and address that matches another customer already on the system. The system determines this by assembling a match code for each customer address on the system. A match code is made up of parts of the customers name, address, and postal code. The match code is a user-defined code defined in the Match Code table; see [Setting Up Match Codes \(MMCH\)](#).



Note:

If you do not set up a match code in the Match Code table, the system displays the first sold to customer, based on sold to customer number, as a duplicate each time you enter a new address.

This window displays the new customer's name and address and the matching customer on the system. You can:

- Select Display for the matching customer to review additional name and address information to determine whether you should use the existing customer or create a new customer, *or*
- Select an existing address and select Select Exist to select an existing customer for the new order, *or*
- Select Accept Dup to use the new address and create a new Sold To Customer

Display Pop Up Msgs For Window

A window opens if text has been defined for the [Pop up window messages 1-4](#) fields for the sold to customer on the order and the customer did not advance to the order from the [Customer Selection Screen](#).

When a Window Opens

The system might also display a default payment type, customer actions or promotional pricing pop-up window at the [Work with Order Screen](#) that you must complete before you can select other functions or advance to the [Work with Order Lines Screen \(Adding Items to the Order\)](#).

Default payment type: The [Default Paytype Pop-up Windows](#) opens if you define a default payment type on the [Default Values for Orders screen](#) for cash/checks or credit cards. You can provide some basic payment information on the pop-up payment window before you continue entering the order. See [Default Paytype Pop-up Windows](#).

Customer actions: A window opens automatically on the Work with Order screen if the customer has an unresolved customer action issue. This may be something that you need to speak with the customer about or it may be an open issue that needs to be resolved. See [Displaying More Options in OIOM](#).

Promotion message: A window opens automatically if there is a message associated with the promotion code defined for the source code on the order header. See [Working with Source Codes \(WSRC\)](#) for more information on setting up promotions and source codes.

Screen Option	Procedure
Accept, validate, and process the order.	Select Accept Order; see Accepting or Rejecting the Order .
Reject (cancel) the order	Select Reject Order; see Accepting or Rejecting the Order .
Enter a recipient order	Select Add Recipient; see Adding a Recipient Order in Order Entry .
 Note: • You will first advance to the Work with Order/Recap Screen if the Display Order Recap (A75) system control value is selected. • This option is not available for a store pickup order; see Store Pickup Orders for an overview.	
Add additional charges to the order	Select Additional Charges; see Adding Miscellaneous Charges or Credits in Order Entry .
Enter or confirm the shipping address (permanent record).	Select Address Book; see Using a Permanent Shipping Address in Order Entry .

Screen Option	Procedure
Enter or confirm the billing address for this order only.	Select Bill To; see Assigning a Billing Address in Order Entry .
Identify the items being ordered.	Select Detail; see Work with Order Lines Screen (Adding Items to the Order) .
Enter or verify additional address information	Select Expanded Address or click the plus sign (+) next to the <i>Street</i> ; see Expanding the Address in Order Entry .
Enter or verify order messages	Select Messages; see Adding Order Messages .
Display additional options	Select More Options; see Displaying More Options in Order Entry .
Enter or confirm the shipping address (this order only) or select a store location for a ship-for-pickup order	Select One Time Ship To; see Assigning an Order Shipping Address .
Add payment information to the order.	Select Pay Methods; see Enter Payment Method Screen .
Work with additional order properties	Select Properties; see Defining Order Properties .
Enter the address of the gift recipient.	Select Sold To/Recipient; see Adding a Recipient Order in Order Entry .
Work with the order summary information for each recipient on the order	Select Summary; see Working with Order Summary Information .

Work with Order Lines Screen (Adding Items to the Order)

Purpose: Use this screen to identify the items being ordered.

The screen is divided into 5 parts:

- The top of the screen displays order and customer information that is updated by the system.
- The center of the screen displays the item entry fields where you enter the necessary information to add an item to the order.
- The upper right displays running order totals that change dynamically as items are added to or deleted from the order.
- The center of the screen also displays several options that allow you to work with the individual lines on an order.
- The bottom portion of the screen displays the last three items you have added to the order with a second line of information for each item. If you have added more than three items to the order, you can select Next or Prev to review additional order lines that you have entered.

Order Information Fields

The Order Information fields on the [Work with Order Lines Screen \(Adding Items to the Order\)](#) contain several system-updated fields unique to the current order. The order information fields are:

- [Order#](#)

- [Recip sts \(Recipient status\)](#)
- Sold To customer
- Ship to customer

This information appears in the *Sold-to* fields:

- The [Cmp \(Company\)](#) followed by the customer's [Last Name](#), [First Name](#), and [Initial](#).
- The customer's [Last Name](#), [First Name](#), and [Initial](#) if no company is specified.

The system inserts ATTN: between the company name and the customer name; this screen does not display the value from the [Attn \(Attention\)](#) field on the [Work with Order Screen](#).

Item Image

If you have specified an image of the item most recently added to the order, the screen displays this image between the [Order Information Fields](#) and the [Order Totals](#).

If you click on the actual image and you have set up item images on an external image hosting application, the system opens a web browser to the URL specified in the *Information Link* field for the item/SKU on the [Item Image/Info Link Screen](#).

For more information: See [Item Image/Info Link Screen](#) for more information on setting up item images on an external image hosting application to display in order entry, order maintenance, and at the Work with Items screen.

Order Totals

The system accumulates the current charges on the order in the Order Totals fields on the [Work with Order Lines Screen \(Adding Items to the Order\)](#):

- [Merch \(Merchandise\)](#)
- Freight: see [Frt \(Freight\)](#) for more information
- Freight +: see [Frt+ \(Additional freight charges\)](#) for more information
- [Tax](#)
- Handling: see [Hnd \(Handling charge\)](#) for more information
- Charges: see [Chg \(Additional charges\)](#) for more information
- [Total \(Order total\)](#)

The individual charges on the order are summarized in the *Total* field, enabling you to determine quickly what the customer is charged for items ordered, tax, freight, and additional charges, either by charge type or as a grand total.

Initially, the Order Totals fields are blank; however, the system updates the Order Totals fields as you add items to the order or as you attach additional charges.

You cannot enter information in these fields.

Item Entry Fields

Use the item entry fields to add items to the order. The item entry fields are:

- [Ofr \(Offer\)](#)
- [Item](#)
- [SKU](#)
- [Qty \(Quantity ordered\)](#)

- [Price](#)
- [No charge \(indicator\)](#)
- [Ovr \(Price override reason code\)](#)
- [S/H \(Special handling code\)](#)

Entering items: The item entry fields, located in the center of the screen, are described below.

Field	Description
Ofr (Offer)	A code for the catalog, space or television advertisement from which you accept orders. Default offer Normally, the offer associated with the source code on the order header defaults here when you are using the line-format entry screen (see the description of the Position Cursor on Offer Field in OE/OM (F91) system control value). You can override this offer. Position Cursor on Offer Field in OE/OM (F91) The <i>Ofr</i> field will be blank if this system control value is selected; also, the cursor positions to this field. You might select this system control value to require order entry operators to verify and enter the offer for each item. If this system control value is unselected, the offer from the source code on the order header defaults, but you can override it; also, the cursor positions in the <i>Item</i> field. Linked Offer You can link a main offer to a sub-offer in Work with Offers. If you enter an item that is not found in the offer defined on the order detail line, the system uses the price defined for the item in the sub-offer linked to the offer. If a sub-offer has not been defined for the offer, or a price has not been defined for the item in the sub-offer, the system uses the most current active offer to determine the item's price. See Working with Offers (WOFR). <i>Alphanumeric, 3 positions.</i>

Field	Description
Item	A code for an existing unit of inventory. Item codes are defined in and validated against the Item table. Alias You can enter an alias for the item if the alias is defined for this item in the selected offer. Aliases are alternate names for items that you might use to track how presentation within an offer affects the item's sales performance. The alias you enter will display once you have entered the order detail line if the Display Item Alias (D56) system control value is selected. Cross Reference Code You can enter a code that represents another system's item and SKU in this field, provided the code does not exceed 12 positions. When an operator enters a cross reference code in the <i>Item</i> field, the system searches the SKU Cross Reference table alphanumerically for a Order Administration item that is associated with the cross reference code. If an Order Administration item is associated with the cross reference code, the system defaults the Order Administration item to the detail line. If a Order Administration item is not associated with the cross reference code, the system displays an error message. See Maintaining SKU Cross Reference Codes (MSKR). It is possible to set up a SKU cross reference code that exceeds 12 positions for integration with another system, such as ChannelAdvisor; however, you cannot enter these longer cross reference codes in order entry. See ChannelAdvisor Integration Overview for background. Membership item If you enter a membership item, you advance to the Enter Membership ID Window (Selecting a Membership Program). Restricted item If you enter an item which is restricted from being shipped to the address of the ship to customer, the item is highlighted and a message indicates: Item (XXXXX) cannot be shipped to (COUNTRY/STATE). You cannot enter an item on an order if it is restricted for the ship to address. See Entering Additional Item Information for an explanation of country/state restrictions for an item. Zone Reservation Coded item If you enter a zone reservation coded (weather-sensitive) item, and you have set up the required supporting tables for zone reservation processing, you might advance to the Display Zone Reservation Dates Window or the Select Order Line Option Window, depending on the date of the order and the zone reservation dates you have specified for this item. Under zone reservation processing, an item is not reserved in order entry; instead, you can reserve the item during pick slip generation.

 Note:

If you have not set up the required supporting tables, a zone reservation item is reserved under normal order

Field	Description
	entry processing except that if it is backordered, you cannot reserve the item through the Evaluate Backorders Periodic function; you can reserve it using the Interactive Reservations menu option. See Working with Interactive Reservation (MIRV). See Shipping Zone Reservation Overview for a complete discussion of zone reservation rules. Scanning for Items When you prompt on this field, you advance to: - the Item Selection screen if the Auto-Generate Item Keywords from Description (F79) system control value is unselected. Note: Items whose status match the Item Status for Suppressing Item During Item Selection (L21) are not listed at this screen. - the Keyword Selection Screen (Scanning for Items Using Item Keywords) if the Auto-Generate Item Keywords from Description (F79) system control value is selected. <i>Alphanumeric, 12 positions; required.</i>
SKU	A code that further defines an item's color, size, width, or any other type of user-defined attribute. If you are unsure of the SKUs available for an item, you can enter the item code, press Enter, review the contents of the SKU Scan Screen, and select the desired SKU from the scan. Inventory levels on the system and in the warehouse are maintained at the SKU level if the item has SKUs. The SKU portion of the item number consists of three 4-position fields. For example, SIZE represents SKU element 1, CLR (color) represents SKU element 2, and STYL (style) represents SKU element 3. Note, however, that these are user-defined fields in the System Control table. These labels are for demonstration only. The first 14 positions of the SKU description from Work with Item/ SKUs is indicated in place of the SKU elements of a SKUed item if the Display SKU Description in place of SKU Element (F25) system control value is selected. SKUs are defined in and validated against the SKU table. <i>Alphanumeric, three 4-position fields; required if the item has SKUs.</i>

Field	Description
Qty (Quantity ordered)	The number of units of the item being ordered. May default from the Default Order Quantity (B30) system control value, but you can override it. The quantity ordered does not increase to reflect any sold out units. You can order up to 99,999 units of a single item on one order line. The Maximum Order Quantity (C60) system control value controls the maximum value you can enter in the <i>Quantity</i> field; additionally, the Allow Maximum Order Quantity Override (A70) secured feature controls whether individual users can exceed this maximum. See Maximum Order Line Quantity/Value.

 Note:

If you enter a negative number, the system will process the transaction as a return of this number of units. See [Posting a Return or Exchange Through Order Entry](#).

Numeric, 5 positions; required.

F (Recalculate freight) **Note:**

This field is available in Order Maintenance only.

Controls whether the system recalculates freight for the item based on changes to its quantity or price in order maintenance.

- Selected = The system recalculates freight for the item based on changes to its quantity or price in order maintenance.
- Unselected = The system does not recalculate freight for the item based on changes to its quantity or price in order maintenance.

The [Recalculate Freight Default \(F62\)](#) system control value controls the default setting of this field, but you can override this default.

Field	Description
Price	The system price of a single unit of the item. The price is assigned by the system when you press Enter, but you can override it. Price Overrides If you have the authority, you can override the price of an item. You must specify a price override reason code in the Ovr (Price override reason code) field. You can use the Price Override Limit Percent (E55) system control value to define a maximum override percentage for operators. The system uses the price defined in the item/offer to determine whether the price override exceeds the percentage. The override limit applies only to prices that are lower than the item/offer price. This check may be helpful in reducing fraud. Price Override Example The system uses this calculation to determine the percentage of the price override: (offer price - price override entered) / offer price * 100 = price override percentage Example: <pre>price override percentage = 10% offer price = \$40.00 price override = \$35.00 (40.00 - 35.00) = 5.00 5.00/40.00 = .125 .125 * 100 = 12.50 (12.50 exceeds the 10% price override</pre> The system displays a message if you enter a price that is lower than the minimum: Entered price exceeds the override limit. The Override Price Override Limit (A64) secured feature controls the ability to override the percentage defined in the Price Override Limit Percent (E55) system control value. Pricing Hierarchy The system calculates the price of an item by taking into account any price breaks and source or order discounts, and uses the pricing routine (pricing hierarchy) in the Pricing Values (B31) system control value to determine the price of the item on the order line. However, if a customer price group is defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value, the system always uses Customer Price Group Pricing. Entity-level override You can set up separate pricing hierarchies for each entity in your company to override the default pricing hierarchy defined in the Pricing Values (B31) system control value. See Working with Entities (WENT). Reviewing the Order Line Price Method When you finish entering a line, you select Change for the line to advance to the Work with Order Line Screen (Changing/Adding an Item) to determine how the system priced the line. The pricing method used by the system appears in the upper right of the screen under the <i>Price</i> field. For example, *Offer Price may appear if the price was defined in the offer through which the item was

Field	Description
	ordered. This information is also available through standard Order Inquiry.
	VAT If you make any changes to the order that will result in changing whether the order is subject to VAT, the system will reprice each item accordingly and recalculate tax as well. However, this update does not take place for any line with a price override, whether the override was made by a user or by the system (for instance, for a price table premium). You must delete the line and reenter it to correct the price and tax information.
	Override Price Table Maximum You can use the Price Table Level Override Code (E05) to apply the best possible price table pricing to an order line, even if it is beyond the maximum specified in the price table; however, to apply this pricing, you need to: 1. Enter the requested quantity of the item using the default pricing 2. Select Change for the item to advance to the Work with Order Line Screen (Changing/Adding an Item) 3. Complete this screen by entering the Price Table Level Override Code (E05), but no price for the item When you select Reprice or Accept, the system applies the best possible price table pricing. See Working with Price Tables (WPTB) and the Price Table Level Override Code (E05) system control value for more information.
	Manual Price Override Code You cannot use the Price Table Level Override Code (E05), Price Override Reason for Price Matrix Customer Specials (K42) , or Price Override Reason for Promotions (K45) as a regular price override reason code when you manually enter a price override.
	Negative Prices The Allow Negative Prices in Order Entry (E97) system control value controls whether you can enter a negative item price. If you enter a positive item quantity, a negative price produces a credit; with a negative quantity, a negative price produces an invoice.
	Maximum Value The Maximum Order Line Value (E98) system control value controls the maximum dollar value of a line you can enter; additionally, the Allow Maximum Order Line Value Override (A69) secured feature controls whether individual users can exceed this maximum. See Maximum Order Line Quantity/Value . <i>Numeric, 13 positions with a 2-place decimal; required, calculated by the system.</i>

Field	Description
No charge (indicator)	Determines whether the customer will be charged for this item on the order. Valid values are: • No Charge = Item is sold at no charge to the customer. • Priced = (Default): Customer will be charged a price for the item. If set to No Charge, the system does not: • add the price of the item to the order totals • print a charge on the pick slip for this item • charge the customer for this item Also, the system requires you to define a price override reason code in the Ovr (Price override reason code) field. If this field is unselected, the system calculates the price for the line and adds this charge to the order totals. Tax? The system does not calculate tax on the merchandise value of the item sold at “no charge”; however, the system may tax freight or special handling. Freight? The system calculates freight (shipping) charges for the order regardless of whether the item is sold at no charge. You can, however, prevent the system from calculating freight for the entire order by selecting the <i>Calc freight</i> field on the previous screen. The system does not calculate freight for any other lines on the order, even those for which the customer will be charged. You cannot suppress freight charges at the line level. Duty? The system adds duty for each unit of the item based on whether the harmonize code defined for the item or SKU matches a duty rate defined for the country where the order is shipping. If the item is entered for no charge, the system bases the duty on the item's offer price. See Working with Items on the Order for more information on duty. Special handling charge? The system adds the special handling charge for item personalization (such as monogramming, engraving, altering, etc.), if any, to the order totals, even if the item is sold at “no charge.” Gift wrapping charge? The system adds the gift wrapping charge, if any, to the item, even if the item is sold at no charge.

Field	Description
Ovr (Price override reason code)	A code that represents the reason for overriding the item price or selling the item no charge. The system uses this code as an audit trail that links the operator who performed the price override or who sold the item at no charge. Price override reason codes are defined in and validated against the Price Override Reason table. See Establishing Price Override Reason Codes (WPOR). Secured feature User and user class security control access to this field. See Setting Up Secured Features. Price Table Pricing If you use price table pricing, you can define a Price Table Level Override Code (E05). Use this code to override the maximum price break you have defined for an item in the price table. Customer Price Group Price Override Reason Code If you assign the price override reason code defined in the Price Override Reason Code for CPG Pricing (L59) system control value, the order line cannot be further discounted except by order-level coupons. Quantity Price Matrix Customer Special If the order line is priced using a Quantity Price Matrix Customer Special, the system assigns the Price Override Reason for Price Matrix Customer Specials (K42) to the order line during repricing. When this price override reason code is defined for an order line, the system cannot apply any additional discounts, such as promotions, to the order line. However, the system can still apply a source % discount to the order line. In addition, the system prevents you from manually entering this price override reason code on an order line: Price override reason reserved and cannot be manually entered. See Order Repricing, Premiums, Discounts, and Promotions for more information about repricing and Working with Quantity Price Matrix (WQPM) for an overview on quantity price matrix pricing. Warranty Item If the Default Price Override Reason for Warranty Items (G01) system control value is set to a price override code, the system defaults the code to this field when an operator adds a warranty item to the order. Item Category or BOGO Promotion If the order line is discounted through an Item Category or BOGO (Buy One/Get One) promotion, or priced at “no charge” through a BOGO promotion, the system uses the Price Override Reason for Promotions (K45). This system control value prevents further discounting from applying to the order line. If this system control value is blank, the system uses the Default Price Override Reason (B35) for the “no charge” lines; however, the other lines discounted through these promotions will be subject to further discounting. See Working with Promotions (WPRO) for more information. You cannot manually enter the Price Override Reason for Promotions (K45) on an order detail line. <i>Numeric, 1 position; required if performing a price override or selling item at no charge; otherwise, optional.</i>

Field	Description
S/H (Special handling code)	A code that represents the type of personalization to be performed, such as monogramming, alterations, engraving, etc. Some items require special handling; this code may default from the S/H code (Special handling code) field for the Item/Offer or SKU/Offer. Special handling is optional for other items. When you prompt on this field, only the additional charge codes identified as special handling codes (by a value in the <i>S/H fmt</i> field for the Additional Charge) are listed. Special handling codes are defined in and validated against the Additional Charges table. See Establishing Additional Charge Codes (WADC). Special handling validation If you enter a special handling code, the system verifies that special handling has been defined for the item in the item/offer or SKU/offer and displays a message if special handling has not been defined: Special handling is not valid for this item in this offer. The special handling instructions and special handling charge print on the pick slip. See Special Handling Overview. <i>Alphanumeric, 2 positions; optional.</i>

Order Lines Fields

The fields in the lower portion of the [Work with Order Lines Screen \(Adding Items to the Order\)](#) display the items you have already added to the order.

The system displays two lines of information for each item. Up to three items appear on the screen at once.

A Next>> button on the lower right of the screen indicates that there are additional item detail lines on the order beyond those currently displayed. Use this button to review or work with these items.

1st line of information: The first line of information for each item includes:

- [Ofr \(Offer\)](#)
- [Item](#)
- [SKU](#) (if any)
- [Qty \(Quantity ordered\)](#)
- [Price](#) (if any)
- [No charge \(indicator\)](#) (if any)
- [Ovr \(Price override reason code\)](#) (if any)
- [S/H \(Special handling code\)](#) (if any)
- [Extension](#) (Unlabeled field to the right of the S/H field)

2nd line of information: The second line of information for each item includes:

- [Line number](#) (first unlabeled field, line 2)
- [Item description](#) (2nd unlabeled field, line 2)

- **Rsv (Quantity reserved)** (appears only if quantity actually reserved)
- **Avl (Quantity available)**
- **Sts (Status)**
- **Exp (Expected receipt date)**

Field	Description
Item	The code for an item.
	 Note: An item alias is indicated if the customer ordered using an alias and the <i>Display Alias Item (D56)</i> system control value is selected.
SKU	<i>Alphanumeric, 12 positions; display-only.</i> The specific style of the item, such as its color and size. The SKU description of a SKUed item is provided in place of the SKU elements if the Display SKU Description in place of SKU Element (F25) system control value is selected. <i>Alphanumeric, three 4-position fields; display-only.</i>
Qty	The number of units of the item being ordered. <i>Numeric, 5 positions; display-only.</i>
Price	The price for a single unit of the item. The price will be highlighted if it is less than the regular offer price for the item, the Display Order Line Discount Messages (F01) system control value is selected, and you do not specify a price override reason code whose Override item offer price field is selected. The system displays a message at the bottom of the screen describing the discount; for example: Line 2: Offer = 10.00 Actual = 9.00 Discount = 1.00: 10.00% See Discount Calculation Messages. <i>Numeric, 13 positions with a 2-place decimal; display-only, updated by the system.</i>
N/C	Determines whether the customer will be charged for the item. • selected = Item is sold at no charge to the customer. • unselected (default) = Customer will be charged a price for the item.
Ovr	A reason code for overriding the item price or selling the item at “no charge.” <i>Numeric, 1 position; display-only.</i>
C/G (Coordinate Group)	A code you assigned to two or more items to guarantee that they ship together. <i>Numeric, 3 positions; display-only.</i>
S/H (Special handling code)	A code that indicates the type of personalization to be performed, such as monogramming, alterations, engraving, etc. See Special Handling Overview for more information. <i>Alphanumeric, 2 positions; display-only.</i>

Field	Description
Extension	The price at which the item is sold multiplied by the quantity ordered, minus any quantities returned or canceled on the same line. The total of the extended prices for each item detail line equals the value in the <i>Merch</i> (merchandise dollars) field. Does not include any other types of item charges, such as freight, tax, gift wrap, special handling, etc. <i>Numeric, 20 positions with a 2-place decimal; display-only, calculated by the system.</i>
Line number	The number of the item detail line. The item detail lines appear in descending line number sequence, so the most recent item added to the order appears underneath the item entry fields. The line numbers are resequenced if you delete any items from the order; the deleted item detail lines are removed entirely and the line number is reused. This sample shows the screen before and after you delete an item from the order: Screen before you delete item: <pre> SHIRT 16 WHITE OX 33.00 1 N 007 LONG SLEEVE BUTTON DOWN Avl: 0 Sts: S SHIRT 15 WHITE OX 1 33.00 1 N 33.00 006 LONG SLEEVE BUTTON DOWN Rsv: 1 Avl: 23 SHIRT 14 WHITE OX 1 33.00 1 N 33.00 005 LONG SLEEVE BUTTON DOWN Rsv: 1 Avl: 232 + </pre> Screen after you delete the item: <pre> SHIRT 16 WHITE OX 33.00 1 N 006 LONG SLEEVE BUTTON DOWN Avl: 0 Sts: S SHIRT 15 WHITE OX 1 33.00 1 N 33.00 005 LONG SLEEVE BUTTON DOWN Rsv: 1 Avl: 23 + </pre> Example: Line number 001 is for item #1390, line number 002 is for item #0519, and line number 003 is for item #0503. If, however, you delete line 001 (item #1390) by selecting Delete, notice that the line numbers are resequenced and the deleted line is removed entirely. The before- and after-images in the sample screen show how the system rennumbers the lines. <i>Numeric, 3 positions; display-only.</i>
Item description	The description associated with the item. <i>Alphanumeric, 120 positions; display-only.</i>

Field	Description
Rsv (Quantity reserved)	The quantity reserved on the system for this order detail line. The system may reserve inventory from a single warehouse or over multiple warehouses, depending on whether a warehouse code is defined for the order line or order header and the values in the Ship Complete from 1 Warehouse (B16) system control value. Influences on Reservation Reservation occurs only if: • The Immediate Reservation (A64) system control value is selected. • The Use OROB for Fulfillment Assignment (M31) system control value is unselected. • The order is not a future order -- the system-calculated date is less than or equal to today's date (see the Arrival date field). • The order is not a zone reservation order -- zone reservation is used for weather-sensitive items, which are not reserved until pick generation (see Shipping Zone Reservation Overview). • Both the customer and customer class are not flagged for <i>Bypass reservation</i>. • The quantity ordered of the item is not greater than or equal to the <i>SKU Reserve quantity</i> for the Item. • The Reservation freeze field for the Item/warehouse is not selected. • Reservation can be performed against the warehouse, meaning the warehouse is flagged as <i>Allocatable</i>. However, if the Reserve from Non-Allocatable Warehouse (J25) system control value is selected, the system allows you to reserve against a non-allocatable warehouse. • Inventory is available. When the Item Cannot be Reserved If no quantity is available of the item, the <i>Rsv</i> field does not appear for the item detail line. The <i>Avl</i> field is updated by the quantity ordered; this value appears as a negative number. The system backorders the requested order quantity and updates the detail line with a backorder reason of No allocate and updates the backorder warehouse on the order detail line. When the Item is Partially Reserved If the entire quantity ordered is not available for the item, the quantity available is reserved (and is provided in the <i>Rsv</i> field) and the quantity unavailable is backordered (and is a negative number in the <i>Avl</i> field). The system updates the detail line with a backorder reason of Not enough avail in whse. Using Interactive Reservation If you use Working with Interactive Reservation (MIRV), no inventory is reserved until you run the Interactive Reservation program to disperse inventory manually to preferred customers or customers who buy in high volume. Interactive Reservation can be used to reserve inventory for an item if the quantity ordered exceeds the Reserve qty (Reserve quantity limit) defined in the Item table. Display of this field: The Display Reserved and Exp Date in OEOM (J02) secured feature controls whether this screen displays the reserved quantity. <i>Numeric, 5 positions; display-only.</i>

Field	Description
Avl (Quantity available)	The quantity of the item that is available to sell across all shippable warehouses. Represents the quantity of the item available in the system that is not set aside for other orders or backorders. The system reduces the quantity available and updates the quantity open by the quantity ordered each time you enter an item. Availability is reduced regardless of the type of reservation used (immediate or interactive). Immediate Reservation The system uses this calculation to determine item availability in a single warehouse (Item/Warehouse level) when using Immediate Reservation: On hand - Protected - Reserved - Reserve Transfer - Backordered = Quantity Available With Immediate Reservation, inventory is reserved dynamically for items as they are entered. The Immediate Reservation (A64) and FIFO Flag (A03) system control values are selected. Fields Used in the Availability Calculations - On hand: The quantity of this item currently in the warehouse. - Protected: The quantity of this item that the system cannot reserve for immediate reservation, as defined for the item. This inventory is reserved only during Interactive Reservation (used to disburse inventory manually to customers who bypass reservation because they buy in high volume). - Reserved: The quantity of this item already set aside for other orders. - Reserve transfer: The quantity of this item set to be transferred to another warehouse. - Backorder: The quantity of this item unavailable for existing orders that must be fulfilled through PO receipts. - Projected return: The quantity of this item you expect to receive in customer returns and have available to fulfill backorders. You can set the Projected returns for each item. The system checks the projected return field only if the item has a soldout control status of 2 (include on-order quantity on purchase orders); see Working with Soldout Controls (WSLD). Positive Quantity Available If the quantity available is a positive number, the system increments the quantity reserved (in the <i>Rsv</i> field) immediately (when using Immediate Reservation), so that the item is reserved for the current order and not for another person's order. Negative Quantity Available If the quantity available is a negative number, the system: - Does not reserve the item in any warehouse (because there is none to reserve) - Displays a negative number in the <i>Avl</i> field equal to the quantity ordered (if the entire order quantity is backordered). Also, if the entire order quantity is sold out, no <i>Qty</i> is provided, and the order totals do not increase. Partial Quantity Available If the system finds a portion of the order quantity available in the warehouse, it will reserve what it can and backorder or sell out the rest. The <i>Rsv</i> field displays the quantity reserved and the <i>Avl</i> field displays the quantity backordered as a negative number. Any

Field	Description
	quantity sold out does not appear in the Qty field and does not increase the order totals. The quantity available for each of these fields represents the quantity at the Item/Warehouse level, which may be: • The warehouse list for the item, which is structured so that inventory will be reserved from the warehouse closest to the shipping destination. • Or, the warehouse defined at the item detail line level (this is an override to the warehouse defined for the order). • Or, the warehouse defined for the order. • Or, several different warehouses (if the quantity ordered of the item is not completely available in a single warehouse and you can ship from multiple warehouses, as defined in the Split Line Over Multi Whse (B19) system control value), • Or, a single warehouse (based on the value in the Split Line Over Multi Whse (B19) system control value). Display of this field: The Hide Item Availability in Order Entry (J66) system control value controls whether this screen displays the available quantity. <i>Numeric, 7 positions; display-only, updated by the system.</i>

Field	Description
Sts (Status)	The current status of the order detail line. The status field is blank (Open) or is set to an S (soldout) during Order Entry: Open Status An item is assigned an open status when it is added to an order and it is currently “active” in your inventory. Sold Out Status The system changes the status of the item to S (Sold Out), based on one of these values in the <i>S/O control</i> field for the item: • 1 = Sell out item immediately, <i>or</i> • 2 = Sell out item when the quantity available plus the quantity on-order on purchase orders is exhausted, <i>or</i> • 3 = Sell out item when the quantity available is exhausted. The system prints a Soldout Notification Card for mail order customers if a discontinued item is ordered; phone order customers are notified of the discontinued status while placing the order. These customers do not receive soldout notifications. If a partial quantity of the item is sold out on the order line, the order line status is still open. The order line and order totals reflect the line quantity that is reserved or backordered, but do not reflect the soldout quantity. You can select Change for the item to review the quantity of the order line that is reserved or sold out. Soldout Controls for Non-Allocatable Warehouses If the Disregard Soldout Controls for Non-Allocatable Warehouses (J27) system control value is selected, the system disregards soldout control rules for inventory reserved against a non-allocatable warehouse. If the item cannot be reserved, the system backorders the item in the non-allocatable warehouse. You can reserve against a non-allocatable warehouse if the Reserve from Non-Allocatable Warehouse (J25) system control value is selected. Other Status Codes There are several other order detail line status codes that are assigned by the system at other points during the life of an order detail line, including: • C = Canceled • X = Closed (item was shipped to customer) • E = Error (the item ordered through a phone service included data errors that you must correct) • B = Express bill (no pick slip produced for item, because item already removed from inventory; order moves directly to billing status) • H = Held • SP = The item is flagged for store pickup. See Store Pickup Orders for background. <i>Alphanumeric, 1 position; display-only.</i>

Field	Description
Exp (Expected receipt date)	The date on which a purchase order that can fulfill this order detail line is expected. The expected date is provided only if: - there are open (unreceived) purchase orders that can fulfill this item detail line. The expected receipt date is cleared once the purchase order is received through Purchase Order Receiving. - inventory that can fulfill this item detail line is located in a pending putaway warehouse. The expected receipt date is cleared once the inventory in the pending putaway warehouse is moved to the “final destination” warehouse. See Pending Putaway Overview. Drop ships: This date is included for drop ship items only if the Assign Drop Ship Expected Ship Date (I59) system control value is selected. See that system control value for more information. Display of this field: The Display Reserved and Exp Date in OEOM (J02) secured feature controls whether this screen displays the expected receipt date. <i>Numeric, 6 positions; display-only.</i>

**Note:**

If you receive an error such as `Error occurred on call to program ILX0023` when adding an item to an order, it is possible that a flag has been set incorrectly in the IL Outbound Trigger Rules table. To prevent this message, query the IL Outbound Trigger Rules table in the database and confirm that there is not a trigger rule option with its flag set to Y even though you are not actually using that trigger rule for an integration layer process. See [Defining Outbound Interface Trigger Rules](#) for background on setting trigger rules.

Screen Differences to Note When Using SKUs

Purpose: Your screen may look different, depending on whether items have SKUs, how each SKU field was labeled and sequenced, and whether you use regular item entry or Page/Letter entry.

Using SKUs? One of the primary business decisions made by your company is whether items have SKUs.

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

Inventory levels on the system and in the warehouse are maintained at the SKU level if you use SKUs.

Labeling the SKU elements: You can use three fields for entering item styles. These three fields are known as “SKU elements.” In the System Control table your System Administrator defines:

- Each SKU element (such as color, size, and width)
- The primary SKU element, the element for which you can define groups of characteristics (such as size: petite, small, medium, large, 5, 7, 9, 12, etc.). The primary SKU element is used in the SKU generator.

- The column headings for each SKU element; these are the labels that appear over each SKU field, such as COL, SZE, WTH.

Sequencing the SKU elements: Additionally, your System Administrator defines the sequence in which the SKU elements appear in Order Entry, such as SZE, COL, WTH. The sequence usually depends on how items are ordered, usually driven by the format of your order forms.

There may be a different sequence of the SKU fields for Inventory applications, depending on how the people who manage the inventory or how your merchandising staff would like to work with the product.

SKU Scan Screen

Purpose: Use this screen to select a style of the item to add to the order and, optionally, to specify the quantity being ordered. This screen also provides options for you to:

- Check on inventory availability
- Review any special pricing promotions
- Review the purchase order delivery schedule to determine when the SKU will be available for sale
- Obtain additional information about the item

System control value which affects this screen: If system control value [Restrict SKU Scan by Offer \(H34\)](#) is selected, the screen lists only SKUs included in the offer associated with the order line. If this value is unselected, this screen lists every SKU defined for the item in the SKU table. If you have not defined offers for the SKUs of an item at the SKU level, the system defaults the offer defined at the item level for each SKU.

Advantages: There are several advantages to the SKU Scan screen:

- The screen displays the range of styles available for the item
- You can cross-sell the customer to another, comparable style if the requested style is not immediately available for sale (out of stock)



Note:

Restricted SKUs, identified by a selected *Restrict* field in the SKU table, do not appear on the SKU Scan screen.

Screen sort: SKUs sort on this screen alphanumerically by the SKU sort sequence number assigned to each SKU. SKUs that are not assigned a SKU sort sequence number display at the top of the list and are sorted alphanumerically by SKU code. See [SKU Sort Sequence Numbers](#) for an overview.

How to display this screen:

- At the [Work with Order Lines Screen \(Adding Items to the Order\)](#) enter a code for an item that has SKUs but do not fully specify the SKU information before you select OK
- Prompt (click on the arrow in) the SKU field(s)
- Select an item with SKUs at the [Select Incentive Item Screen](#) or the [Select Incentive Group Window](#)

Field	Description
Item (Item code)	The code of the item being ordered. Item codes are defined in and validated against the Item table. This is the base item code. The item alias is provided here if the customer ordered using an alias and the Display Item Alias (D56) field in the System Control table is selected. <i>Alphanumeric, 12 positions; display-only.</i>
Order qty (Quantity ordered)	The number of units being ordered. Brought forward from the previous screen if: - you entered a value in the Qty field - the value defaulted from the Default Order Quantity (B30) system control value No Order quantity is displayed if you: - advanced from the Select Incentive Group Window by selecting Incentive price for the item - did not enter a quantity on the Work with Order Lines screen In this situation, you can complete the Qty field, below. <i>Numeric, 5 positions; display-only.</i>
Item description (Unlabeled field below Item field)	The description associated with the item. <i>Alphanumeric, 120 positions; display-only.</i>
SKU	The specific style of the item, in terms of color, size, width, or some other identifying attribute that makes this item unique. Every SKU defined for the item appears in the SKU Scan window. SKUs sort on this screen alphanumerically by the SKU sort sequence number assigned to each SKU. SKUs that are not assigned a SKU sort sequence number display at the top of the list alphanumerically by SKU code. See SKU Sort Sequence Numbers for an overview. <i>Alphanumeric, three 4-position fields; display-only.</i>
SKU description (Unlabeled field to the right of the SKU)	The description associated with the SKU code, as defined in the SKU table. <i>Alphanumeric, 25 positions; display-only.</i>
Sts (Status)	A code that identifies the status of the SKU in your inventory. Set to selected if the item is flagged as a discontinued. - Selected = SKU is discontinued. - Unselected = SKU is not discontinued; it is an active unit of inventory. The system allows you to enter orders for discontinued items. The value in the <i>S/O control</i> field for the item, if any, determines whether the system changes the status of the discontinued item to “sold out”: - Immediately, <i>or</i> - When the quantity available is exhausted, <i>or</i> - When the quantity available plus the quantity on-order on purchase orders is exhausted. The system prints a Soldout Notification Card for mail order customers if a discontinued item is ordered; phone order customers are notified of the discontinued status while placing the order. These customers do not receive soldout notifications.

Field	Description
Avail (Quantity available)	This is the quantity of this item that is available to sell across all shippable warehouses. A negative quantity indicates that the SKU is unavailable in your inventory and is backordered. <i>Numeric, 7 positions; display-only, updated by the system.</i>
Qty	The number of units of this SKU being ordered. Available only if you did not specify a quantity on the previous screen. Maximum quantity entry: - If you advanced from the Select Incentive Group Window by selecting Incentive price for the item, the system does not let you enter a quantity greater than the <i>Qty limit</i> specified for the promotional pricing. See Upselling with Promotional Pricing for an overview. - The Maximum Order Quantity (C60) system control value and the Allow Maximum Order Quantity Override (A70) secured feature control your ability to exceed a given order line quantity, while the Maximum Order Line Value (E98) system control value and Allow Maximum Order Line Value Override (A69) secured feature control your ability to exceed a given order line value. <i>Numeric, 5 positions; optional or display-only.</i>
Expected date	The date on which the next purchase order for this SKU is due. The expected date is cleared once the purchase order is received through Purchase Order Receiving. Pending Putaway Warehouse An expected date also is provided for inventory located in a pending putaway warehouse. This date represents the date the inventory will be moved to its “final destination” warehouse. See Pending Putaway Overview . Drop ships: This date is included for drop ship items only if the Assign Drop Ship Expected Ship Date (I59) system control value is selected. See that system control value for more information. <i>Numeric, 6 positions, in user date format; display-only.</i>
Expected qty	The number of units of the SKU ordered on the purchase order. Pending Putaway Warehouse The number of units of the SKU located in a pending putaway warehouse. See Pending Putaway Overview . <i>Numeric, 7 positions; display-only.</i>

Completing this screen:

- Select the desired SKU, or
- Use the *Select* checkbox to select more than one SKU.

 Note:

You can only select SKUs that display on the current screen; if you select SKUs on the first screen and then click Next to select additional SKUs, the system only creates order detail lines for the SKUs that you selected on the second screen.

- Use the Qty field to enter the quantity desired of each SKU. You can only enter a quantity in the Qty field if no quantity was specified on the [Work with Order Lines Screen \(Adding Items to the Order\)](#).

 Note:

The system creates an order detail line for each SKU for which you enter a quantity, even if you need to click Next to select additional SKUs.

Item status message: You advance to the [Item Status Message Window](#) if an item status message is defined for the status code associated with the item or SKU. Select OK on this window to continue.

 Note:

See [Upselling with Promotional Pricing](#) for more information on completing this screen if you advanced from the [Select Incentive Group Window](#).

Select OK to create an order detail line for the SKU(s). The system creates one order detail line for each SKU you select.

Screen Option	Procedure
Review on-hand availability statistics for the SKU across all shippable warehouses	Select Availability for a SKU to advance to the Item Availability Screen .
Review any special pricing promotions for the SKU in the SKU/Offer table	Select Prices for a SKU to display the Quantity Pricing pop-up window. See Upselling the Customer in Order Entry .
Review the PO delivery schedule for the SKU	Select POs for an SKU to display the Display Open Purchase Orders Screen .
Search for the item across warehouses and stores in external systems	Select Merch Locator for an item to advance to the Merchandise Locator Search Window (Searching for an Item). You cannot perform a merchandise locator search for an item/SKU if: • the Use Merchandise Locator (I38) system control value is unselected. Otherwise, the system displays an error message: Merchandise Locator is not enabled. • you have already entered an <i>Ord qty</i> to add to the order. • the item is: – soldout, canceled or closed – included on a printed pick slip (however, if the pick slips have been voided, you can use the merchandise locator option) – a component of a set – a membership item – a subscription item – not flagged as <i>OROB eligible</i> See Merchandise Locator API.

Screen Option	Procedure
Review the original offer price and the incentive price for the SKU	Select Incentive price for the SKU to advance to the Incentive Price Window . This option is available only if you advanced to the SKU Scan screen from the Select Incentive Group Window .

 Note:

If you advanced to the SKU Scan screen by selecting Incentive price for the item at the [Select Incentive Group Window](#), you will need to select Options on/off before this option is available.

Adding Different Types of Items to the Order

Purpose: You can add different types of items to the order at the [Work with Order Lines Screen \(Adding Items to the Order\)](#). The following are described below:

- [Entering a Subscription Item](#)
- [Entering a Warranty Item](#)
- [Entering a Stored Value Card Item](#)
- [Entering Set Items](#)
- [Entering Multiple Ship-Alone Units on a Ship-for-Pickup Order](#)

For various other types of items, you advance to a pop-up window or to a different screen upon item entry. See:

- [Select Variable Set Items Screen](#)
- [Entering Customer Memberships in Order Entry](#)
- [Upselling with Promotional Pricing](#)

Entering a Subscription Item

If the customer orders a subscription item, the system express bills the order detail line when you generate pick slips and:

- bills the customer for the entire amount of the subscription item
- closes the order detail line
- changes the status of the line automatically to X (shipped)
- does not reduce inventory
- creates a Customer Subscription record in the Sold To or Ship To (if recipient) Customer table (which defines the unique characteristics of the subscription)
- logs a message to Order History for the express-billed subscription item and each issue of the subscription; Order History is viewable from Order Maintenance and standard or streamlined Order Inquiry

For more information: See [Working with Item Subscriptions \(WISB\)](#).

Entering a Warranty Item

If the customer orders a warranty item, the system:

- updates the *Warranty item* field on the order detail line to selected.
- updates the *No charge* field on the order detail line to selected.
- applies the Default Price Override Reason for Warranty Items (G01); otherwise, if this system control value is blank, the operator must enter a price override reason code.
- If you want to track the reason why the warranty item was added to the order, you can require the operator to enter an add reason code for the item. See [Enter Add Reason Window](#).
- if the operator enters a price for the warranty item, the system displays an error message:
Warranty item - price not allowed.

For more information: See [Working with Customer Warranty Information \(WCST\)](#).

Entering a Stored Value Card Item

If the customer orders a virtual stored value card item (the *SVC type* field for the item is V), the system requires you to define an email address in order to send a [Stored Value Card Notification Email](#) to the recipient of the virtual stored value card. An email address is required because the email notification is the only way the recipient of the virtual stored value card will receive the stored value card number associated with the order. If you order a virtual stored value card item and the customer is not assigned an email address or the opt in/out value is invalid, the screen displays an error indicating you cannot accept the order: Invalid e-mail address/opt in for order containing virtual SVC item.

For more information: See [Stored Value Card Email Hierarchy](#) for more information on the hierarchy the system uses to send a Stored Value Card Notification to the recipient of the stored value card.

Entering Set Items

Set items are groups of one or more items that you sell together as a unit. The items that make up a set are referred to as component items. The components can also be sold individually.

Set items are designated by an S in the [Kit type](#) field in the Item table. The individual components associated with the set are defined in the Set table. Each set component must exist in the Item table.

When you place an order for a set item, a detail line is created for the main set item along with each component item. The price of the set is located at the main set item level. Any changes you make to the main set item, for example, changing the order quantity or selling out the set, are also reflected in the component items. Notice that the system underlines the main set item.

Secured feature: The [Set Component Maintenance \(J01\)](#) secured feature controls the ability to change, delete, or sell out a set component in order entry. See that secured feature for more information.

Soldouts:

- Component items(s):
 - If the [Sell Out Set if Component is Sold Out \(I05\)](#) system control value is selected: When any of the component items on a set are sold out based on the assigned soldout control code and the current inventory situation, the main set item and each of the component items are added to the order in a soldout status (S). For example, if the set includes five items, and one of the items is assigned a soldout control code indicating to sell the item out immediately, the main set item and all of the component items will be added to the order in a soldout status.

- If this system control value is unselected: In the example described above, just the sold out component item is added to the order in a soldout status.
- Main set item: If the main set item itself is assigned *any* soldout control code, the main set item and each of the component items are added to the order in a soldout status (S).

See [Working with Soldout Controls \(WSLD\)](#) for a discussion on how soldout controls indicate when an item is sold out.

For more information:

- creating a set item: [Performing Initial Item Entry \(MITM\)](#)
- adding components to a set item: [Entering Set Information \(WSET\)](#)

Entering Multiple Ship-Alone Units on a Ship-for-Pickup Order

When you enter a ship-for-pickup order, you cannot enter an order line with a quantity greater than one for an item that is flagged to ship alone. If the customer wants more than one unit of the item, you need to enter each unit as a separate order line.

See [Ship-for-Pickup Orders](#) for a discussion.

Select Variable Set Items Screen

Purpose: Use this screen for the customer to select a pre-defined number of items from each group to make up the set they want to purchase. A variable set, for example, may be a special promotion such as, "...Choose any 2 slacks, 1 jacket, and 1 belt from this page for only \$200.00."

Variable sets consist of several items that the customer can select to make up the desired set.

A variable set item is designated by a V in the [Kit type](#) field in the Item table. The individual components associated with the variable set item are defined in the Variable Sets table. Each variable set component item must exist in the Item table.

Each component item of a variable set is aligned to a group. For example, you may define a variable set group for slacks, another for jackets, and a third for belts. You then may define the component items for each variable set group and include a wide variety of colors and sizes for each group.

The customer must select the specific item(s) desired from each group at the [Select Variable Set Items Screen](#) to satisfy the requirements of the variable set (such as, 2 slacks, 1 jacket, and 1 belt). The system ensures that the customer orders the correct quantity from each variable set group by maintaining a counter of the number of items allowed as compared to the number of items ordered.

Detail lines will be added to the order for each variable set component item selected.

For more information:

- creating variable set items: [Performing Initial Item Entry \(MITM\)](#)
- adding components to a variable set item: [Entering Variable Set Information \(WVST\)](#)

How to display this screen: The customer orders a variable set item at the [Work with Order Lines Screen \(Adding Items to the Order\)](#).

Field	Description
Variable set (Variable set item description)	Displays the description of the variable set, brought forward from the Description field in the Item table. <i>Alphanumeric, 120 positions; display-only.</i>

Field	Description
Order #	Displays the number assigned by the system to identify this order. This information is brought forward to this screen from the previous screen. <i>Numeric, 9 positions; display-only, assigned by the system.</i>
Group	Displays the number and description of the group of variable set component items, as defined in the Variable Set Groups table. See Entering Variable Set Information (WVST) . <i>Group number: Numeric, 3 positions; display-only.</i> <i>Group description: Alphanumeric, 30 positions; display-only.</i>
# of items allowed	Displays the required quantity of this variable set component item, as defined in the # of items field in the Variable Set Groups table. The system validates that the customer orders this number of items from the variable set group. The value in the # <i>selected</i> field must equal this value. <i>Numeric, 6 positions; display-only.</i>
# selected	The quantity of the variable set component item ordered from the variable set group. The system updates this value as variable set component items are added to the order. The system validates that the customer selects the required number of component items from each group, as defined in the # <i>of items allowed</i> field. The system does not allow you to accept your entries unless the # <i>selected</i> value equal the # <i>of items allowed</i> value. <i>Numeric, 6 positions; display-only.</i>
Qty	The number of units of this variable set component item. This is the amount of the item being ordered. <i>Numeric, 5 positions; display-only.</i>
Item	The code for a variable set component item number, as defined in the Item table and assigned to the variable set in the Variable Set Components table. <i>Alphanumeric, 12 positions; display-only.</i>
SKU	The specific style of the item, in terms of color, size, width, or some other identifying attribute that makes this item unique. <i>Alphanumeric, three 4-position fields; display-only.</i>
Description	The description associated with the item. <i>Alphanumeric, 25 positions; display-only.</i>
Selected	The quantity of this variable set component item currently selected for the order. The system updates this number as this item is added to the order. <i>Numeric, 7 positions; display-only, updated by the system.</i>
Offer price	The price defined for this variable set component item. If selected, this item will be added to the order at the offer price. <i>Numeric, 8 positions; display-only, updated by the system.</i>

Instructions:

1. Select the desired variable set component item(s) in each group, making sure that the number you select is the number allowed.
2. Select OK.

3. Select Change Qtys to change the quantity selected for a variable set component item (you can enter over the value that appears in the Qty field), *or*
4. Select Unselect All to change the quantity selected of all variable set component items to zero (erase all your selections), *or*
5. Select Accept Order to accept your entries and create detail lines on the order for these variable set component items, *and*
6. Return to the item entry screen; notice that the variable set component items have been added to the order in the specified quantity, at the offer price.

Screen Option	Procedure
Select a variable set component item	Select an item.
Remove a variable set component item from the order	Select Unselect for an item.

Miscellaneous Messages and Windows at Item Entry

Purpose: Depending on the type of item, how it is flagged, or the setting of various system control values, the system might display the following messages when you enter an item, or a window might open:

- [Discount Calculation Messages](#)
- [Maximum Order Line Quantity/Value](#)
- [Work with Item/SKU Comments Window](#)
- [Enter Add Reason Window](#)
- [Item Coordinate Message](#)
- [Ship Via Overrides for Item Window](#)
- [Item Status Message Window](#)

Each is described below.

Discount Calculation Messages

If the [Display Order Line Discount Messages \(F01\)](#) system control value is selected, each time you add an item to the order at a discounted price from the regular offer price for the item, the system:

- highlights the item price in a reverse color
- displays a message describing the amount and percentage discount represented by the item price.

Any price that is lower than the regular offer price for the item will be highlighted, and the discount calculation message will display. For example, if you override the price manually or use a pricing method such as price tables, quantity price matrix, or promotional pricing, the item is considered discounted.

```
BU001 CHOC LRGE 1 2.51 A 0 N 2.51
```

```
005 CHOCOLATE EASTER BUNNY Rsv: 1 Avl: 26
```

Discount calculation: A message displays for each discounted item: Line 1: Offer = 10.00
Actual = 9.00 Discount = 1.00: 10.00%

This message includes:

- the order line number of the discounted item
- the offer price
- the actual price (the discounted price the customer is paying)
- the dollar amount of the discount
- the discount percentage

When the message is not displayed: The system does not display the message or highlight price when you override the price on the order line, and:

- no item/SKU offer price exists, or
- the price override reason code's [Override item offer price](#) is selected.

See [Overriding the Item/SKU Offer Price](#) for an overview.

Message displayed when? The discount calculation message is displayed when you first add the item to the order. In the case of price table repricing, the calculation message is displayed when you reprice the order.

To review messages for other items: A plus sign (+) in the message area of the order detail screen indicates that there are discount calculation messages related to additional items on the order; you can review these messages by positioning your cursor on the same line as the plus sign and pressing Page down. To cycle back up through the calculation messages for the items on the order, press Page up. You can review the calculation messages only for the items that are currently displaying on the order detail screen. Press Page down or Page up to display earlier or subsequent items on the order and/or their related discount calculation messages.

If you delete a discounted item, the plus sign may remain on the screen until you select refresh to refresh.

Maximum Order Line Quantity/Value

You can define a maximum quantity or dollar total for individual order lines using these system control values:

- Maximum Order Quantity (C60)
- Maximum Order Line Value (E98)

For example, if you set the Maximum Order Quantity (C60) to 10, the system would validate that you do not enter a single order line with a greater quantity. This might help prevent inaccurate orders due to user error, such as entering 100 instead of 10.

If you set either of these values to 0, the system does not validate whether order lines exceed the maximum.

Secured features: These secured features control the ability to exceed these limits:

- Allow Maximum Order Line Value Override (A69)
- Allow Maximum Order Quantity Override (A70)

Pop-up window: If you have the proper authority, the Confirm Quantity/Line Value window opens when you exceed the maximum. Select Accept at this window to confirm the quantity and add the line to the order. If you cancel, an error message indicates an excess quantity:

Order Qty of 50 exceeds the maximum allowed in SCV C60.

An error message indicates an excess order line total dollar value: Order line value of 1000.00 exceeds maximum allowed in SCV E98.

If you do not have the proper authority, the window does not display. Only the error message is displayed, and you will not be able to override the maximum.

Work with Item/SKU Comments Window

This window opens after you add an item to the order if there are any item comments associated with the item or SKU. Comments must have the *Print code* set to Window for the window to open.

See [Entering Additional Item Information](#) on setting up item or SKU comments.

About this window: The window displays any comments entered at the SKU level for a SKUed item; if there are no SKU-level comments, the window displays item-level comments. If this is a SKUed item, the SKU is displayed only if the comments are associated with the SKU rather than the base item.

The window displays up to 10 lines. A plus sign (+) indicates that there are additional lines.

Enter Add Reason Window

You advance to this window after an operator adds an item to the order if the [Required reason code](#) field for the item offer or SKU offer is selected. Enter the add reason code that describes your reason for adding this line to the order. The add reason code is a 5-position, alphanumeric field, defined in the Add Reason table, that defines the reason for adding an item to an order in order entry or order maintenance.

For more information: See [Establishing Add Reason Codes \(WADR\)](#).

Item Coordinate Message

When you enter an order for an item that is associated with any item coordinates:

- If the [Automatically Display Coordinate Items in Order Entry \(I53\)](#) system control value is selected and the Promo flag for the order type is set to Promo Price, the [Display Coordinate Items Window](#) opens automatically advance to the Display Coordinate Items window when you add an item associated with coordinate items to an order.
- Otherwise, the screen displays a message `Coordinate items exist for base item entered.` You must Select Coordinates for the item to advance to the [Display Coordinate Items Window](#) if this system control value is not selected and/or the *Promo* flag is set to None.

The system will cross-sell coordinates even if the primary item is soldout, on backorder, is a drop ship item, non-inventory item, or main set item. Additionally, the system will cross-sell coordinates that are a drop ship item, non-inventory item, or main set item.

When the system does not cross-sell coordinates: See the [Automatically Display Coordinate Items in Order Entry \(I53\)](#) system control value for a discussion of when the system prompts you to select coordinates for an item.

You can still select Coordinates for the primary item to advance to the [Display Coordinate Items Window](#); however, if all of the coordinates are on backorder or soldout or are not included in the same offer as the primary item, there are no coordinates available to select.

Ship Via Overrides for Item Window

Item ship via overrides indicate the shippers the system can use to deliver a particular item to its destination. When you add an item to an order, the system looks at the Item Ship Via Override table to see if the ship via on the order header is an eligible shipper for the item.

The system first checks the order detail line to see if a ship via code is assigned at this level; otherwise, it checks the ship via for the order ship-to. Normally, the ship via field on the order line is blank unless there is an override.

- If the ship via on the order line (if one is assigned) or the order header is an eligible shipper for the item, the system uses that shipper to ship the item to its destination.
- If the ship via on the order line (if one is assigned) or the order header is not an eligible shipper for the item, you advance to the Ship Via Overrides for Item window, requesting you to select an eligible shipper for the item on the order line.

 Note:

If there are no records in the Item Ship Via Override table for an item, *all* shippers are eligible to ship the item and the Ship Via Overrides for Item window does not open when you add the item to an order.

This window opens if the ship via on the order line (if one is defined) or the ship via on the order header is not eligible to ship the item, and you:

- select OK to add the item to the order.
- select OK to accept any changes you made to the order line at the Work with Order Line screen.
- select Accept or Add Recipient to accept the order if the order is eligible for other ship via overrides or you have changed the ship via on the order header since adding the item to the order.

To complete this window: Select the shipper you wish to use to ship the item to its destination and select OK. The system assigns the selected shipper to the *Ship via* field on the order line; however, the system does not override the existing shipper on the order header.

For more information: See [Working with Item Ship Via Overrides](#).

Item Status Message Window

This window displays after you add an item to the order if an item status message is defined for the status code associated with the item or SKU.

The item status message defined for the item status at the SKU level overrides the item status message defined for the item status at the item level.

To create an item status code: Use the [Working with Item Status \(WIST\)](#) menu option to create an item status. The text you enter in the *O/E message 1* and *O/E message 2* fields displays in the Item Status Message window.

To assign an item status code to an item/SKU:

- Use the *Status* field on the first [Create Item Screen](#) or Change Item screen to assign a status code to an item.
- Use the *Status* field on the [Create SKU 2 of 2 \(With Overrides\) Screen](#) or Change SKU 2 of 2 (With Overrides) screen to assign a status code to a SKU.

About this window: The window displays any item status messages entered at the SKU level; if there are no SKU-level item status messages, the window displays item-level messages. If this is a SKUed item, the SKU is displayed only if the comments are associated with the SKU rather than the base item.

After you have reviewed the item status message lines, select OK to add the item to the order.

Future order item status: You can default a future ship arrival date to an item defined with a future ship status on an order by entering the status code in the [Future Orders Item Status \(E52\)](#) system control value. The future arrival date that defaults for this item is taken from the date defined in the [Default Future Orders Arrival Date \(E53\)](#) system control value. In this situation, you might use the *Item status message* fields as a reminder to your operators when an item with this status is ordered, that it is a future ship item.

Duplicate Item for Customer Window

If the [Duplicate Item Check \(C09\)](#) system control value is selected, this window opens when you enter an item that has already been included on an order for the customer within the specified [Duplicate Item Days \(C58\)](#). This window lists:

- the item you just entered
- the number of days specified in the Duplicate Item Days (C58) system control value

To add the item to the order, click OK or press Enter.

To cancel entry of the item, click Exit or press F12.

Set items: This window opens when you enter a set item if the main set item or any of its components has been included on an order for the customer within the Duplicate Item Days (C58). Similarly, this window opens if you enter an item that is a component of a set and the set has been included on an order within the Duplicate Item Days (C58).

Example: Set item SET123 includes items COMP123, COMP456, and COMP789. If you have previously entered an order for SET123 and you enter an order for COMP123 within the Duplicate Item Days (C58), the Duplicate Item for Customer window opens. Similarly, if you have previously entered an order for COMP123 and you enter an order for SET123 within the Duplicate Item Days (C58), the Duplicate Item for Customer window opens.

For more information: See Duplicate Item Days (C58) and Duplicate Item Days (C58).

Displaying the Detail Line Options

The detail line options are available for you to work with items you have already added to the order.

Screen Option	Procedure
Update any information for the item, review how the system priced the item, and review the quantity and date the inventory was reserved by the system	Select Change for the item to advance to the Work with Order Line Screen (Changing/Adding an Item) .

Note:

This option is controlled by the Set Component Maintenance (J01) secured feature for set component items. If you do not have the required authority, the system displays an error message: Not authorized to change, delete, cancel, or sell out a set component.

Screen Option	Procedure
Remove the item from the order <i>immediately</i>	Select Delete for the item to delete it. The lines are resequenced, reusing the line number of the deleted line.
	 Note: This option is controlled by the Set Component Maintenance (J01) secured feature for set component items. If you do not have the required authority, the system displays an error message: Not authorized to change, delete, cancel, or sell out a set component.
Review the pending deliveries of this item on purchase orders placed with your suppliers	Select POs for the item to advance to the Display Open Purchase Orders Screen .
Review the availability of an item across all shippable warehouses	Select Availability for the item to advance to the Item Availability Screen .
Review additional items coordinated with the item for cross-selling purposes	Select Coordinates for the item to advance to the Display Coordinate Items Window if any coordinates are linked with the ordered item.
Enter a coupon to apply to the order or item	Select Coupons for the item to advance to the Coupon Discount Window .
Search for the item across warehouses and stores in external systems	Select Merchandise Locator for an item to advance to the Merchandise Locator Search Window (Searching for an Item). You cannot perform a merchandise locator search for an item/SKU if: - the Use Merchandise Locator (I38) system control value is unselected. Otherwise, the system displays an error message: Merchandise Locator is not enabled. - you have already entered an <i>Ord qty</i> to add to the order. - the item is: – soldout, canceled or closed – included on a printed pick slip (however, if the pick slips have been voided, you can use the merchandise locator option) – a component of a set – a membership item – a subscription item – not flagged as <i>OROB eligible</i> See Merchandise Locator API.
Attach messages behind the item detail line that optionally print on the pick slip and/or invoice or are used for internal reference	Select Messages for the item to advance to the Work with Order Line Messages Screen .

Screen Option	Procedure
Review the quantity break prices for the item (as defined for the Item/Offer) to upsell the customer	Select Prices for the item to review the Display Quantity Pricing pop-up window. See Upselling the Customer in Order Entry .
Sell out an item	Select Sell Out to put the order line in sold out status and recalculate tax.
 Note: This option is controlled by the Set Component Maintenance (J01) secured feature for set component items. If you do not have the required authority, the system displays an error message: Not authorized to change, delete, cancel, or sell out a set component.	
Modify the special handling instructions and charges (for engraving, monogramming, altering, etc.) of an item eligible for special handling, as defined for the Item/Offer	Select Special Handling for the item to advance to Work with Special Handling Screen or Work with Custom Special Handling Screen .
 Note: This option is not available if the additional charge code used for the special handling format applied to the item is suppressed; see Special Handling Overview for a discussion.	
Review additional order detail lines on the order	Select the Next or Prev button; this button displays on the lower right of the screen if additional order detail lines exist on the order beyond those currently displayed. Use this button to review or work with these items.

Completing the Work with Order Lines Screen

Purpose: Now you are at the point where you have successfully entered all the items being ordered on the [Work with Order Lines Screen \(Adding Items to the Order\)](#). Before you can accept the order on the system, you must provide some payment information on the:

- [Default Paytype Pop-up Windows](#)
- [Enter Payment Method Screen](#)
- [Work with Order/Recap Screen](#)

Screen Option	Procedure
Accept, validate, and process the order.	Select Accept Order; see Accepting or Rejecting the Order .
Reject (cancel) the order	Select Reject Order; see Accepting or Rejecting the Order .

Screen Option	Procedure
Enter a recipient order	Select Add Recipient; see Adding a Recipient Order in Order Entry . - You will first advance to the Work with Order/Recap Screen if the Display Order Recap (A75) system control value is selected. - This option is not available for a store pickup order; see Store Pickup Orders for an overview.
Add an item to the order while defining line overrides at any level, such as offer, source code, warehouse, etc.	Select Add Line to advance to the Work with Order Line Screen (Changing/Adding an Item) .
Add additional charges to the order	Select Additional Charges to advance to the Enter Additional Charges Window .
Enter or verify order messages.	Select Messages to advance to the Work with Order Messages Screen .
Display additional options	Select More Options to advance to the Display More Options Screen .
Return to the Work with Order screen	Select Order Header.
Add payment information to the order.	Select Pay Methods; see Enter Payment Method Screen .
Obtain information about compatible items.	Select Relationships to advance to the Select Item Relationships Window .
Apply or review order-level coupons, apply any order-level discounts to the order totals or review any promotions that currently apply to the order	Select Reprice. See Order Repricing, Premiums, Discounts, and Promotions .
Work with order information for each recipient order.	Select Summary to advance to the Display Order Summary Screen .
Review items on the order.	Select Scan Order Lines to advance to the Scan Order Lines Screen .

Screen Option	Procedure
Find a store location where the items are available so the customer can pick up the order at the store	Select Store Pickup to advance to the Merchandise Locator Search Window (Store Pickup) .  Note: - This option is available only if the Use Merchandise Locator (I38) system control value is selected and the Store Pickup Order Type (L33) system control value specifies an order type. Also, this option is available in order entry only, and not in order maintenance. - You cannot select the Store Pickup option if the order includes any items that: - are not flagged OROB eligible - have special handling instructions or have the Gift wrap flag selected - are held Also, the order must: - not include more than one ship-to - include at least one item that is not sold out - not be a ship-for-pickup order

See [Store Pickup Orders](#) for an overview and more background.

Order Repricing, Premiums, Discounts, and Promotions

Purpose: Repricing allows the system to reprice the order based on any discounts, premiums, and promotions that are applied to the order.

- [Types of Discounts and Promotions Applied During Repricing](#)
- [When Repricing Occurs](#)
- [Applying Order Audit Discounts during Repricing](#)
 - [Order Audit Discounts during Repricing Process Flow](#)
- [Repricing Screen Flow](#)
 - [Coupon Discount Window](#)
 - [Price Table Repricing](#)
 - [Display Premiums Screen \(Price Table Premiums\)](#)
 - [Enter Promotion Code Screen](#)
 - [Enter Coupon Discount Amount Window](#)
 - [Applying Free Gifts](#)

Types of Discounts and Promotions Applied During Repricing

The system allows you to:

- Perform [Customer Price Group Price Code Pricing](#) if a customer price group is defined in the [Customer Price Group Code for CPG Pricing Only \(L58\)](#) system control value and the Price Codes (D93) system control value is selected.
- Apply discounts such as free gifts based on the offer or source code, additional charge dollar discounts based on the offer or source code, or package inserts.
- Enter a coupon promotion, as defined in [Working with Coupon Promotions \(WCPR\)](#).
- Review any price table premiums that may apply to the order, adding or deleting them if desired, as defined in [Working with Price Tables \(WPTB\)](#).
- Apply a promotion to the order, if the Allow Manual Entry of Promotion Code (I63) system control value is selected.
- Review any promotions set up through [Working with Promotions \(WPRO\)](#) that currently apply to the order, if the Allow Manual Entry of Promotion Code (I63) system control value is unselected.
- Enter a coupon discount amount, if the [Prorate Dollar Discounts and Coupons \(D90\)](#) system control value is selected.
- Perform End of Order Quantity Price Matrix Pricing if the *Quantity Price Matrix Pricing (K41)* system control value is selected.
- Enter a Oracle Retail Customer Engagement award amount on the [Enter Loyalty Award Discount Window](#) to apply as a pro-rated merchandise discount to the order lines on the order if the [Use ORCE Loyalty \(M06\)](#) and Prorate Dollar Discounts and Coupons (D90) system control values are selected; see [Applying and Redeeming Customer Engagement Awards during Order Processing](#).
- Calculate freight if the freight method is Freight by Order Weight; see Freight by Order Weight Calculation Logic and Examples.

When Repricing Occurs

The system reprices an order when the *Price method* for the source code on the order header is set to Reg Plus Reprice and you:

- Select Reprice at the [Work with Order Lines Screen \(Adding Items to the Order\)](#).
- Select Accept or Exit at the [Coupon Discount Window](#) if the Automatically Reprice Coupon (K02) system control value is selected.
- Select Accept Order on the Work with Order Lines screen if you are using the Work with Order Recap screen (the Display Order Recap (A75) system control value is selected).
- Select Pay Methods on the Work with Order Lines screen to advance to the [Enter Payment Method Screen](#).
- Select Accept Order or Add Recip to perform the final order accept.
- Accept the order by selecting Accept.

Final reprice: The system will reprice the items after you accept the order. For example, you might delete or cancel an item on the order, reducing the merchandise total below the minimum required for the coupon. However, the changes in price after you accept the order will not be visible and you will not be able to inform the customer of the repricing unless the Display Order Recap (A75) system control value is selected; in this case, you can review the repriced order totals at the Order Recap screen.

If you do not use repricing: If you do not use promotions set up through the Working with Promotions (WPRO) menu option, you can set the *Price method* for your source codes in the

Working with Source Codes (WSRC) menu option to Regular Hierarchy so that the system does not reprice the order. An error message indicates that repricing is not available if you select Reprice: *Repricing is not valid with current source price method.* By setting the *Price method* to Regular Hierarchy, you can eliminate repricing processing during order entry and improve order entry performance.

Applying Order Audit Discounts during Repricing

The system applies discounts that are not related to payment method during repricing and the initial order accept in addition to the final order accept. Applying discounts to the order at repricing and the initial order accept enables you to:

- provide an accurate order total to the customer before order payment has been processed.
- ensure the correct discounts have been applied to the order. The discounts are applied after the order has passed all edits, including payment, and can no longer be interactively changed.

Each time you reprice the order, the system adds the available discounts to the [Order Discount Audit Table \(OEODIS\)](#) in order to keep track of which discounts have been applied.

Order Audit Discounts

The following order audit discounts are eligible to apply to an order during repricing, the initial order accept, and the final order accept.

- These types of discounts are associated with Working with Promotions (WPRO):
 - ship via override on freight (order audit discount type FV)
 - ship via override on additional freight (order audit discount type AV)
 - ship via override on order promotion (order audit discount type OV)
 - free freight (order audit discount type FF)
 - freight override (order audit discount type FO)
 - additional charge discount for additional freight promotion (order audit discount type AA)
 - additional charge discount for freight promotion (order audit discount type FA)
 - additional charge discount for order promotion (order audit discount type OA)

Note:

If you specify an additional charge code for the promotion, the discount will appear on the order as a credit additional charge and will be included in the Order Discount Audit table. If you do not specify an additional charge code for the promotion, the discount amount is prorated against the items on the order and will not be included in the Order Discount Audit table.

- additional charge discount for tiered promotion (order audit discount type TA)
- free gift for tiered promotion (order audit discount type TG)
- free gift added for BOGO (Buy One/Get One Free) promotion (order audit discount type FB)

 Note:

No record is created for an order line that discounted or changed to “no charge” through a BOGO promotion, but not added automatically through the promotion.

- Price table premiums (order audit discount type PT) are associated with Working with Price Tables (WPTB).
- Free gifts by source or offer (order audit discount type FG) are associated with Working with Source Codes (WSRC) or Working with Offers (WOFR).

 Note:

Free gifts set up for the source code override free gifts set up for the offer. If an order would qualify for both the offer and source code free gifts, only the source code's free gift is added to the order.

- Additional charge discounts based on offer (order audit discount type RA) are associated with Working with Offers (WOFR).
- Additional charge discount based on source (order audit discount type SA) are associated with Working with Source Codes (WSRC).

 Note:

If the Prorate Dollar Discounts and Coupons (D90) system control value is unselected, the system adds these discounts to the order as a negative additional charge, or credit. However, if this system control value is selected, the dollar discount is applied on a pro-rata basis to each item on the order and is reflected in the selling price.

- Package inserts (order audit discount type PI) are associated with [Package Insert Processing \(WPIP\)](#).

 Note:

The system adds package insert items to the order only if the [Evaluate Promotional Items/Inserts in Order Entry/Maintenance \(E48\)](#) system control value is selected.

 Note:

The order discount audit discounts do not change the price of an existing order line.

Order Audit Discounts during Repricing Process Flow

During repricing and the initial order accept, the system performs the following steps.

1. Uses the [Order Discount Audit Table \(OEODIS\)](#) to remove any discounts that have previously been applied to the order.
2. Clears the records in the [Order Discount Audit Table \(OEODIS\)](#) that are associated with the ship to order.
3. Reprices the order.
4. Processes discounts that apply to the order that do not use a pay type as the qualifier.
5. Creates a record in the [Order Discount Audit Table \(OEODIS\)](#) for the discounts that have been applied to the order during repricing.

During the final order accept, the system:

1. Uses the [Order Discount Audit Table \(OEODIS\)](#) to remove any discounts that were applied to the order during repricing.
2. Clears the records in the [Order Discount Audit Table \(OEODIS\)](#) that are associated with the ship to order.
3. Applies any discounts and promotions, including discounts that use a pay type qualifier, to the order.
4. Creates a record in the [Order Discount Audit Table \(OEODIS\)](#) for the discounts that have been applied to the order during the final order accept.
5. Clears the records in the [Order Discount Audit Table \(OEODIS\)](#) that are associated with the order once the order has been accepted.

Order Discount Audit Table (OEODIS)

When the system adds discounts to an order during repricing and the initial order accept, the system creates a record in the Order Discount Audit table (OEODIS) in order to keep track on which discounts have been assigned to the order. Once the order is accepted, the system removes the records associated with the order from this table. For an order batch, the system removes the records associated with the orders in the batch once the order batch is accepted.



Note:

The system does not store all discounts that apply to the order in the Order Discount Audit table. This table keeps track of the end-of-order type discounts that apply to the order so that they can be removed and reapplied if the order changes before the final order accept.

Field	Description
Company	The company where the order is located. <i>Numeric, 3 positions.</i>
Order #	The order number associated with the discounts. <i>Numeric, 8 positions.</i>
Ship to #	The ship to number associated with the discounts. <i>Numeric, 3 positions.</i>
Seq #	The sequence in which the discounts have been applied to the order. <i>Numeric, 5 positions.</i>

Field	Description
Type	The type of order audit discount. Valid values: • AA = additional charge discount for additional freight promotion • AV = ship via override on additional freight • FA = additional charge discount for freight promotion • FB = free gift added for BOGO (Buy One/Get One Free) promotion • FF = free freight • FG = free gift by source or offer • FO = freight override • FV = ship via override on freight • OA = additional charge discount for order promotion • OV = ship via override on order promotion • PI = package inserts • PT = price table premiums • RA = additional charge discount based on offer • SA = additional charge discount based on source (discount type) • TA = additional charge discount for tiered promotion • TG = free gift for tiered promotion See Order Audit Discounts for more information. <i>Alphanumeric, 2 positions.</i>
Original freight amt	The amount of freight applied to the order before the discount was applied to the order. <i>Numeric, 13 positions with a 2-place decimal.</i>
Promotion freight amt	The amount of freight applied to the order after the discount was applied to the order. <i>Numeric, 13 positions with a 2-place decimal.</i>
Additional chg seq #	The sequence in which the additional charge code associated with the discount was applied to the order. <i>Numeric, 2 positions.</i>
Additional chg amt	The amount defined for the additional charge code that was applied to the order. This amount represents the discount amount. <i>Numeric, 13 positions with a 2-place decimal.</i>
Original ship via	The ship via assigned to the order before the discount was applied to the order. <i>Numeric, 2 positions.</i>
Promotion ship via	The ship via assigned to the order after the discount was applied to the order. <i>Numeric, 2 positions.</i>
ODT seq #	The order detail line sequence number associated with the discount, if any, including a free gift added through a BOGO (Buy One/Get One Free) promotion. See Sequence of Order Line Numbers in the Order Discount Audit for more information. <i>Numeric, 5 positions.</i>

Sequence of Order Line Numbers in the Order Discount Audit

Each time discounts are evaluated (during repricing, initial order accept, and final order accept), the system first removes the discounts that previously applied to the order and then applies the discounts that currently apply to the order. Because the system first removes the discounts that previously applied to the order, gaps may exist in the order line sequence number associated with each order line on the order, based on which discounts and promotions currently qualify for the order.

Example: You add item AB10 to an order for \$28.00 and then reprice the order. The system adds the following to the order.

Line #	Seq #	Item	Price	Comments
1	1	AB10	28.00	Original order line on the order.
2	2	BC10	0.00	Free gift for source code because the merchandise total is greater than \$25.00. (discount type FG)

Before accepting the order, you add item CD10 to the order for \$20.00, bringing the merchandise total to \$45.00.

Line #	Seq #	Item	Price	Comments
1	1	AB10	28.00	Original order line on the order.
2	2	BC10	0.00	Free gift for source code because the merchandise total is greater than \$25.00. (discount type FG)
3	3	CD10	20.00	Last item added to the order.

When you perform the initial order accept, the system reevaluates the order audit discounts that apply to the order.

Line #	Seq #	Item	Price	Comments
1	1	AB10	28.00	Original order line on the order.
2	3	CD10	20.00	Last item added to the order.
3	4	BC10	0.00	Free gift for source code because the merchandise total is greater than \$25.00. (discount type FG)
4	5	EF	0.00	Package insert item added for item CD10. (discount type PI)

Notice the order line sequence number assigned to each order line.

- order line 1 = order line sequence number 1
- order line 2 = order line sequence number 3
- order line 3 = order line sequence number 4
- order line 4 = order line sequence number 5

This is because each time the system reevaluates the order for order audit discounts, the system first removes the order audit discounts that previously applied to the order (in this example, the free gift on line 2) and then applies the order audit discounts that currently apply to the order.

Canceling free gifts, premiums, and package inserts: If you delete a free gift, premium item, or package insert that was added to the order, the system reapplies the item to the order

during repricing, initial order accept, or the final order accept as long as the order still qualifies for the item. In order to remove the item from the order, you need to cancel the item in order maintenance.

Premiums offered at a discounted price: The system automatically adds premium items that are offered as a free item to the order. However, if the premium item is offered at a discounted price, instead of offered as a free item, the system does not automatically add the premium item to the order. Instead, you must select Add to Order for the premium item at the [Display Premiums Screen \(Price Table Premiums\)](#) in order to add the premium item to the order.

Free gift for tiered promotion: If the order qualifies for a free gift for tiered promotion (order audit discount type TG), but also qualifies for other promotions which bring the merchandise total below the amount required for the free gift, the system still applies the free gift to the order.

Free gift by source or offer: If the order qualifies for a free gift by source or offer (order audit discount type FG), but also qualifies for other promotions which bring the merchandise total below the amount required for the free gift, the system removes the free gift from the order.

Special handling: If a package insert item or free gift contains special handling, the special handling window opens during repricing, initial order accept, and the final order accept. You need to reenter any special handling that you may have defined earlier. The system redisplay the special handling window because the system reevaluates the order to see if it still qualifies for the item, and if it does, the system adds the item back to the order.

Repricing Screen Flow

There are several different windows and screens that might open when you reprice an order in order entry, depending on the system control value settings and other values in your company:

	Screen or Window	Opens If:
1.	Coupon Discount Window	You have set up any coupon promotions in Working with Promotions (WPRO)
2.	Display Premiums Screen (Price Table Premiums)	You use Working with Price Tables (WPTB) to apply price tables, and the order qualifies for a premium item.
3.	Enter Promotion Code Screen	The Allow Manual Entry of Promotion Code (I63) and the Prorate Dollar Discounts and Coupons (D90) system control value are selected.
4.	Enter Coupon Discount Amount Window	The Prorate Dollar Discounts and Coupons (D90) system control value is selected and the Automatically Reprice Coupon (K02) system control value is unselected.
5.	Enter Loyalty Award Discount Window	The Use ORCE Loyalty (M06) and Prorate Dollar Discounts and Coupons (D90) system control values are selected, the sold to customer on the order is assigned to a loyalty card in Oracle Retail Customer Engagement, and there are current awards associated with the customer's loyalty account that are available for redemption.

Price Table Repricing

The system applies any repricing to the order based on price tables when you select Reprice or Accept Order. This repricing occurs regardless of whether the order qualifies for price table premium items.

If you use price table pricing, items on the order may qualify for reduced pricing based on the quantity of a particular item, the quantity of a group of items, or the merchandise total of a group of items. The order might also qualify for one or more premium items, as described below. See *Working with Price Tables (WPTB)* for complete information on setting up price table pricing and examples.

Also, if you use price table pricing, the order will be eligible for repricing in both Order Entry and Order Maintenance. Other pricing methods apply in Order Entry only.

You can override the maximum price break set up for an item by using the price override reason code defined in the system control table for price table level override. By entering this code, you “unlock” any additional price breaks defined for the item but not ordinarily offered.

Display Premiums Screen (Price Table Premiums)

Use this window if you use price table pricing to review, accept, or reject premium items that the customer can earn through orders of certain items or groups of items. You use *Working with Price Tables (WPTB)* to set up price tables and price table premiums.

How to display this screen: If the order qualifies for one or more premium items, this screen opens automatically when you:

- select Accept Order or Reprice at the [Work with Order Lines Screen \(Adding Items to the Order\)](#).
- Select Accept or Exit at the [Coupon Discount Window](#) if the Automatically Reprice Coupon (K02) system control value is selected.

See [Repricing Screen Flow](#).

Field	Description
Item	The premium item, specified in the price table, that the order qualifies for. Eligibility for premium items can be based on unit quantity or total dollars of a particular item or a group of items, or both. See <i>Working with Price Tables (WPTB)</i> for information on working with premium items and price tables. Item codes are defined in and validated against the Item table. <i>Alphanumeric, 12 positions; display-only.</i>
SKU	The premium item's unique characteristics, such as its color and size. <i>Alphanumeric, three 4-position fields; display-only.</i>
Description	The description associated with the premium item. <i>Alphanumeric, 20 positions; display-only.</i>
Quantity	The quantity of the premium item earned by the order. The quantity may be a flat amount for each qualifying order, or a multiple of each qualifying amount. For example, if the customer earns a single premium item for each \$50.00 merchandise total for a group of items, and the premium item is set up as a multiple, the customer would earn a quantity of 2 premium items for a \$100.00 merchandise total. <i>Numeric, 5 positions; display-only.</i>
Price	The dollar amount to charge for the premium items. <i>Numeric, 13 positions with a 2-place decimal; display-only.</i>

Field	Description
Add	Indicates whether to add the premium item to the order. Valid values are: - Y = Add the premium item to the order. If the premium item is a “no charge” item (the <i>Price</i> displayed is .00), this flag defaults to Y. - N = Do not add the premium item to the order. If there is a charge associated with the premium item, this flag defaults to N.

Instructions:

1. Select Add to Order for any premium item whose *Add* flag is currently N to add this premium item to the order.
2. Select Remove from Order for any premium item whose *Add* flag is currently Y to omit this premium item from the order.
3. If each premium item has the *Add* flag set correctly, select Exit to exit the screen. The system adds the premium items indicated to the order after you accept it.

Enter Promotion Code Screen

Use this screen to specify one or more promotion codes to apply to the order ship-to.

How to display this screen: This screen opens automatically when you select Reprice at the [Work with Order Lines Screen \(Adding Items to the Order\)](#) or select Accept or Exit at the [Coupon Discount Window](#) or [Display Premiums Screen \(Price Table Premiums\)](#) if the Prorate Dollar Discounts and Coupons (D90) system control value is selected.

See [Repricing Screen Flow](#).

In order to have a promotion whose *Required entry* flag is selected apply to the order, you must enter it at this screen. The system automatically applies promotions whose *Required entry* flag is unselected if the order qualifies. An order can qualify for multiple BOGO and Item category promotion; however, only one promotion of each additional type (order or tiered, freight, or additional freight) can apply to an order. See the discussion of [Promotion Logic and Processing](#) for more information.

**Note:**

If the Allow Manual Entry of Promotion Code (I63) system control value is unselected, this screen does not open. The system automatically applies eligible promotions whose *Required entry* flag is unselected if the order qualifies.

Specifying promotion codes: Enter a promotion code to apply that promotion to the order. You can prompt on the *Promotion code* field to advance to the Select Promotion window. The setting of the Search Promotions by Start Date in Order Entry (M27) system control value defines how promotions sort on the Select Promotion window:

- If selected, the Select Promotion window sorts active promotions in ascending start date sequence. You can use the *Start Date*, *Promotion*, *Description*, and *Type* fields to search for a specific promotion.
- If unselected, the Select Promotion window sorts active promotions in ascending promotion code sequence. You can use the *Promotion* and *Description* fields to search for a specific promotion.

You can select multiple promotion codes of each type, and the system determines which promotion(s) to apply to the order based on your setup. See [Working with Promotions \(WPRO\)](#) for setup information and an overview on promotions.

Verifying that the order qualifies for entered promotions: The system verifies that each entry represents a valid promotion code and that the promotion is active. Additionally, the system verifies that the order is currently eligible for the promotion based on certain basic criteria at the time of entry, although the order might not ultimately be eligible for each promotion entered.

One-time-use promotions: When the promotion's [Use once](#) flag is selected and the promotion has already been applied to an order for the customer:

- If you have authority under the [Override One Time Use Promotion \(J08\)](#) secured feature, a window opens for you to confirm whether to apply the promotion to the current order.
- If you do not have authority under the [Override One Time Use Promotion \(J08\)](#) secured feature, you cannot apply the promotion to the order.

See [Cautions for One-Time-Use Promotions](#) for more information.

Free freight? If the customer is eligible for free freight through a loyalty program, you cannot apply a promotion that includes free freight. See [Loyalty Memberships](#) for background.

What if the order's eligibility for the promotion changes? If you make changes to the order, such as removing an item, adding a payment method, or changing the ship via, the order may no longer be eligible for an entered promotion, or may be eligible for additional promotions.

When does the system apply the promotion discount? The system updates the order with eligible promotions immediately. The promotions applied might be ones you have entered at this screen, or assigned by the system. In addition, the system reevaluates the order for eligible promotions when you accept the order.

If the order does not qualify for the promotion at order acceptance, the system does not apply the promotion discount and does not display an error message.

For more information: See [Working with Promotions \(WPRO\)](#) for an overview on promotions, including types of promotions, how an order qualifies for each, and setup instructions.

Field	Description
Promotion code	Enter a promotion code to apply that promotion to the order. You can prompt on the <i>Promotion code</i> field to advance to the Select Promotion window. The setting of the Search Promotions by Start Date in Order Entry (M27) system control value defines how promotions sort on the Select Promotion window: • If selected, the Select Promotion window sorts active promotions in ascending start date sequence. You can use the <i>Start Date</i>, <i>Promotion</i>, <i>Description</i>, and <i>Type</i> fields to search for a specific promotion. • If unselected, the Select Promotion window sorts active promotions in ascending promotion code sequence. You can use the <i>Promotion</i> and <i>Description</i> fields to search for a specific promotion. Promotion codes are defined in and validated against the Promotion table. You can enter multiple promotion codes of each type, and the system determines which promotion(s) to apply to the order based on your setup. See Working with Promotions (WPRO) for setup information and an overview on promotions. <i>Alphanumeric, 7 positions; Optional.</i> For each promotion selected for the order: The system verifies that each entry represents a valid promotion code and that the promotion is active. Additionally, the system verifies that the order is currently eligible for the promotion based on certain basic criteria at the time of entry, although the order might not ultimately be eligible for each promotion entered.
Promotion	The promotion code selected for the order. <i>Alphanumeric, 7 positions; display-only.</i>
Description	A description of the promotion. <i>Alphanumeric, 30 positions; display-only.</i>
Start Date	The date when the promotion first becomes effective. <i>Numeric, 6 positions; display-only.</i>
End Date	The last date when the promotion is effective. <i>Numeric, 6 positions; display-only.</i>
Type	The type of promotion. Valid values are: • Additional freight • BOGO • Freight • Item Category • Order • Tiered discount • blank = Messaging or reporting promotion <i>Alphanumeric, 30 positions; display-only.</i>

Enter Coupon Discount Amount Window

Use this window to specify a coupon amount to prorate against the items on the order.

How to display this screen: This window opens automatically when you select Reprice at the [Work with Order Lines Screen \(Adding Items to the Order\)](#) or select Accept or Exit at the

[Coupon Discount Window](#), [Display Premiums Screen \(Price Table Premiums\)](#), or [Enter Promotion Code Screen](#) if the Prorate Dollar Discounts and Coupons (D90) system control value is selected and the Automatically Reprice Coupon (K02) system control value is unselected.

See [Repricing Screen Flow](#).

Only one coupon amount can apply to an order. If you select Reprice more than once while entering an order, the window opens again with the coupon amount you previously entered defaulted in the *Coupon amount* field. You can select OK to retain the coupon amount, enter a new amount, or remove the coupon amount from the order.

If you do not select Reprice at the order detail screen in Order Entry, the system still prorates any source code or offer dollar discount to the order; however, you do not have the opportunity to enter a coupon amount.

Field	Description
Coupon amount	The amount of the coupon the system applies to the order. The system applies any coupon amount you enter across all items on the order on a pro-rata basis. If any dollar discounts by source code or offer apply, the system applies them as well, along with any other end-of-order repricing or discounting you have defined. <i>Numeric, 13 positions with a 2-place decimal; optional.</i>
G/M (Gross profit margin)	The unit amount of the order's merchandise that exceeds the cost of all of the item's on the order. You can use gross margin to determine the profit of an order based on each item's selling price. See Determining Gross Profit for more information on the calculations the system performs to determine gross margin and gross margin percentage. The Display Gross Margin (A65) secured feature controls whether this field is provided in order entry, maintenance, inquiry and item availability. <i>Numeric, 13 positions with a 2-place decimal; optional.</i>
G/M% (Gross profit margin percent)	The percentage of the order's merchandise that exceeds the cost of all of the items on the order. You can use gross margin to determine the profit of an order based on each item's selling price. See Determining Gross Profit for the calculations the system performs to determine gross margin and gross margin percentage. The Display Gross Margin (A65) secured feature controls whether this field is provided in order entry, maintenance, inquiry and item availability. <i>Numeric, 7 positions with a 2-place decimal; optional.</i>

Applying Free Gifts

After you select the Reprice option and complete any pop-up windows, the system adds free gifts to the order based on the source code and total merchandise dollars on the order. This window lists the items that will be added to the order and provides you with an opportunity to tell the customer that the order qualified for free gifts.

Setting up free gifts: You set up free gifts for a source code at the Work with Source Free Gifts Screen, or for an offer at the Work with Offer Free Gifts Screen. You need to specify the required merchandise dollar value for an order to qualify for a gift, the quantity of the free gift item to add, and whether an order can qualify for multiple free gifts.

Things to note: The following factors influence how the system adds free gifts to the order:

- Offer price or selling price? To evaluate whether an order qualifies for a free gift, the system compares the total merchandise dollar value after applying any discounts or repricing (that is, the extended selling price of all items) with the \$ *required* specified for the free gift.
- **Multiple gifts?**
 - If the *Allow multiple gifts* flag is selected, the system adds the free gift defined for each dollar threshold met by the order total. For example, if a free gift is defined for an order total of \$10.00, \$15.00, and \$20.00 and the customer orders \$30.00 worth of merchandise, the system will add the free gifts for a \$10.00, \$15.00, and \$20.00 order.
 - If the *Allow multiple gifts* flag is unselected, the system adds the free gift defined for the highest dollar threshold met by the order total. For example, if a free gift is defined for an order total of \$10.00, \$15.00, and \$20.00 and the customer orders \$17.50 worth of merchandise, the system will add the free gift defined for a \$20.00 order, because this is the highest level for which the order qualifies.
- Source vs. offer free gifts: Free gifts set up for the source code override free gifts set up for the offer. If an order would qualify for both the offer and source code free gifts, only the source code's free gift is added to the order.

Determining Gross Profit

Purpose: When you add an item to an order at the [Work with Order Lines Screen \(Adding Items to the Order\)](#), you can determine the item's gross profit based on the item's extended selling price and extended cost.

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

Estimated freight? You can also include the estimated freight charges for a class of items when you determine the gross profit in order entry, item availability, and when [Printing the Order Demand/Sales Reports \(PSSR\)](#). Including estimated freight charges is helpful if you sell merchandise before the actual freight charges are known. See [Working with Item Classes \(WICL\)](#) for more information on how to set up estimated freight charges for a class of items.



Note:

The estimated freight is not included in the calculation for the *G/M* and *G/M %* at the [Display Invoice Header Screen](#) screen in order inquiry or the *Gross profit* listed on the sales journal reports.

Where are gross profit margin and gross profit margin percentage displayed? The gross profit margin and gross profit margin percentages for individual orders or order lines are listed on the screens and reports below.

- **Screens:**
 - [Work with Order Line Screen \(Changing/Adding an Item\)](#) in order entry and order maintenance
 - [Work with Order/Recap Screen](#) in order entry
 - [Display Invoice Header Screen](#) in order inquiry
 - Display Item/Offer Prices Screen, available from the Display Item Availability Screen
- **Reports:**

- [Standard Sales Journal](#)
- [Sales Journal by Division](#)
- [Salesman Demand Report](#)
- [Source Shipped Report](#)

**Note:**

The following reports list gross profit totals across multiple orders:

- [Sales Journal Summary by Period](#)
- [Sales Journal Summary by Offer](#)
- [Sales Journal Summary by Descending Dollars](#)
- [Sales Journal Summary by Invoice Date](#)
- [Sales Journal Summary by Entity/Offer](#)

The Display Gross Margin (A65) secured feature controls the display of the gross profit margin and gross profit margin percentage fields on screens.

**Note:**

If you are using multi-currency by offer (the DMulti Currency by Offer (E03) system control value is selected), the system converts the item's price to your local currency before calculating the gross profit.

Variations in calculation: The gross profit margin or gross profit margin percentage indicated for shipments might differ from those displayed in order entry if the item cost changes. Also, a rounding discrepancy of a cent is possible between the calculations on different screens and reports.

Calculating Gross Profit Margin and Gross Profit Percentage

The calculation of gross profit margin is described below.

**Note:**

Estimated freight is included in the gross profit margin calculation only in order entry, item availability, and when [Printing the Sales Tax Report by State \(PSTX\)](#).

$$(\text{item(s) selling price}) - (\text{item(s) cost} + \text{total estimated freight for the item class}) = \text{gross profit margin}$$
Example:

Item A:

cost = 10.00

extended selling price = 20.00

Item B:

cost = 14.00

estimated freight = 5.00

extended selling price = 27.00

For each item:

$20.00 - 10.00 = 10.00$ (g/m for item A)

$27.00 - (14.00 + 5.00) = 8.00$ (g/m for item B)

For the entire order:

$(20.00 + 27.00) - [(10.00 + 14.00) + 5.00]$

$47.00 - (24.00 + 5.00)$

$47.00 - 29.00 = 18.00$ (g/m for entire order)

The calculation of gross profit margin percentage:

$(\text{extended selling prices}) - (\text{item(s) cost} + \text{total estimated freight for item item}) / (\text{item(s) price} \times 100 = \text{gross profit margin percentage}$

Example:

Item A:

cost = 10.00

extended selling price = 20.00

Item B:

cost = 14.00

estimated freight = 5.00

extended price = 27.00

For each item:

$20.00 - 10.00 / 20.00 \times 100$

$10.00 / 20.00 = .5$

$.5 \times 100 = 50\%$ (g/m% for item A)

$27.00 - (14.00 + 5.00) / 27.00 \times 100$

$8.00/27.00 = .2962$

$.2962 \times 100 = 29.62\%$ (g/m% for item B)

For the entire order:

$(20.00 + 27.00) - [(10.00 + 14.00) + 5.00] / (20.00 + 27.00) \times 100$

$47.00 - (24.00 + 5.00) / 47.00 \times 100$

$47.00 - 29.00 = 18.00$

$18.00 / 47.00 = .3829$

$.3829 \times 100 = 38.29$ (g/m% for entire order)

Calculating Gross Profit Margin and Percentage using Tax Inclusive Pricing (VAT)

In calculating gross profit margin and gross profit margin percentage on all screens and reports except for order entry, the system subtracts the hidden tax from the extended selling price on orders to countries that are subject to Value Added Tax (VAT). On orders subject to VAT, tax does not accumulate in the *Tax* field; instead, the customer pays a tax-inclusive price for each item and the tax is “hidden” on the order detail line in the [Hidden tax](#) field.

Order entry does not include hidden tax when calculating gross profit margin or gross profit margin percentage. See [Calculating Gross Profit Margin and Gross Profit Percentage](#) for the standard calculations used in order entry and on all other screens and reports for orders that are not subject to VAT.

The calculation of gross profit margin using tax-inclusive pricing on all screens and reports except for order entry:

$(\text{extended item(s) selling price} - \text{hidden tax}) - (\text{extended item(s) cost} + \text{total estimated freight}) = \text{gross profit margin}$

The calculation of gross profit margin percentage using tax-inclusive pricing except for order entry:

$(\text{extended item(s) selling price} - \text{hidden tax}) - (\text{extended item(s) cost} + \text{total estimated freight}) / (\text{extended item(s) selling price} - \text{hidden tax}) \times 100 = \text{gross profit margin percentage}$



Note:

Estimated freight is included in the gross profit margin calculation only in order entry, item availability, and when Printing the Order Demand/Sales Reports (PSSR).

Work with Customer Profile

You advance to the [Work with Customer Profile Screen](#) when you select Accept Order or Accept/Add Rcp if you need to collect demographic information for the customer in a category flagged as mandatory.



Note:

If the [Alternate ID Required for Displaying Customer Profile \(K87\)](#) system control value is selected, you advance automatically to the Work with Customer Profile screen only when the sold-to customer has an *Alternate customer number*.

Applying Payment to the Order

Default Paytype Pop-up Windows

Purpose: Use these windows to enter the payment information.

Why opens? These windows open when you select Accept Order or Accept/Add Rcp at the [Work with Order Lines Screen \(Adding Items to the Order\)](#) only if you defined a default payment method on the [Default Values for Orders screen](#).

Enter Cash Control For Window (Cash/Check Payment Type)

This window opens only for a default cash/check payment type:

Field	Description
Pay type	A user-defined code that represents the method of payment on the order. Valid pay types are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY). The pay type that appears at the top of this pop-up window represents a cash/check pay type. <i>Numeric, 2 positions; display-only, updated by the system.</i>
Description (unlabeled field below the Pay type field)	A description associated with this payment method. For example, this field may contain the description CASH/CHECK when using a cash/check payment type to prepay the order. <i>Alphanumeric, 30 positions; display-only, updated by the system.</i>
Amount	The total dollar value of the cash or check paytype. <i>Numeric, 13 positions with a 2-place decimal; required.</i>
Routing #	Informational. Enterable only for cash/check pay types. <i>Alphanumeric, 9 positions; optional.</i>
Account # (Checking account number)	Informational. Enterable only for cash/check pay types. <i>Alphanumeric, 20 positions; optional.</i>
Check #	Informational. Enterable only for cash/check pay types. <i>Numeric, 6 positions; optional.</i>
Charge sequence	The order in which the system should charge each pay type when the customer uses several payment types. Defaults to 1. See Enter Payment Method Screen. <i>Numeric, 2 positions; required.</i>

Instructions:

1. Enter the amount in the *Amount* field and optionally, complete any of the other fields.
2. Select OK to validate your entries and to add this payment information to the order.

Enter Credit Card For Window (Credit Card Payment Type)

You can define a default credit card pay type by entering it at the [Default Values for Orders screen](#).

You can also display this window by selecting Change for a credit card payment method at the [Enter Payment Method Screen](#), or by entering a debit card payment method at the [Work with Order/Recap Screen](#).

Field	Description
Pay type	A user-defined code that represents the method of payment on the order. If the credit card number has been replaced with a token, this field is display-only. Valid pay types are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY). Selecting a Different Pay Type: The pay type listed on this window is a credit card pay type, such as: • regular credit card, such as Mastercard or VISA • stored value card • debit card Each of these examples represents a Card type. You can change the pay type code to another card, if needed. For example, you can use this window to switch from a VISA card to American Express, since they are both regular credit cards; however, you should not use this window to switch from a VISA card to stored value card, or vice versa, as each card type has different entry requirements. To Change the Pay Type to a Different Card Type: To change the pay type to a different Card type, you should select Exit and enter the new payment method at the Enter Payment Method Screen or the Work with Order/Recap Screen. See Types of Credit Cards for more information. <i>Numeric, 2 positions; display-only, updated by the system.</i>
Description (unlabeled field)	A description associated with this payment method. For example, this field may contain the description CREDIT CARD when using a credit card payment type to charge the order. <i>Alphanumeric, 30 positions; display-only, updated by the system.</i>
Card Number	The number of the credit card payment method used on the order. Display-only. All cards must be authorized, either manually or by a credit card authorization service. Display-only? This field is display-only (for a credit card) or blank (for other credit card types). Last four: The system stores the last four digits of the actual credit card number in the <i>CC Last 4</i> field in the Order Payment Method table in order to verify the card with the customer. Changing: If you change the credit card number in order maintenance or through Manage Rejected Deposits in Modern View, the system writes an order payment history record indicating that the credit card number has been changed. See the Display Order Payment History Screen for more information. <i>Alphanumeric, 20 positions; required.</i>
Expiration date	The date (in MMY format) up until which the credit card is valid. For example, enter 1206 if the credit card expires in December of 2006. The Require expiration date flag for the pay type controls whether this field is a required entry. <i>Numeric, 4 positions; required or optional, based on the Require expiration date flag for the pay type.</i>

Field	Description
SVC ID #	The ID number for the stored value card payment. Define an ID number only if your stored value card processor supports it. Order Administration stores the ID number in the <i>OPM SVC ID Storage</i> field in the Order Payment Method table and includes it in the authorization request and deposit request sent for the stored value card payment. <i>Numeric, 9 positions; optional.</i>
Amount	The total dollar value to charge to this paytype. Leave this field blank if: - the customer is using just this card to pay for the order; the system charges this card the total amount due on the order; or, - this is the “catch-all” payment method; the system uses this card to charge the total balance remaining on the order after any other payment method has been charged. The system issues a message for you to delete this amount if: - The customer is using only this card to pay for the order - You accept the order by selecting Accept or Accept/Add Rcp - The dollar amount you specified is insufficient to cover the order. After you delete the amount, the system charges the card the entire amount of the order and you avoid a balance-due situation. See Enter Payment Method Screen for more information about multi-pay type orders. <i>Numeric, 13 positions with a 2-place decimal; optional.</i>
Authorization #	A code that indicates that the amount to charge for this card has been authorized manually or through an authorization service. You can pre-authorize a credit card by entering an authorization number in the <i>Authorization #</i> field; however, you must also enter a value in the <i>Amount</i> field. Enter a code in this field to pre-authorize the credit card when you do not use an authorization service to evaluate and approve your credit card orders. You can enter an authorization number in upper and lower case. Since you cannot enter the Authorization Request ID at this screen, Oracle recommends that you instead use the Add Authorization option from the Order Summary page in Modern View to apply a manual authorization.

 Note:

If you manually authorize a credit card, the credit card will not go out for online or batch authorization.

Secured feature: The ability of a user or user class to enter an authorization code manually for an order is controlled by the secured feature [C/C Authorization Field Access \(A25\)](#).

If you use an authorization service, the system updates this field when an authorization is received.

Alphanumeric, 16 positions; optional.

Field	Description
Authorization date	The date when this payment method was authorized manually or by an authorization service. You must enter an authorization date if you entered an authorization number in the <i>Authorization#</i> field. If you use an authorization service, the system updates this field when an authorization is received. <i>Numeric, 6 positions (in user date format); optional.</i>
Issue #	An incremental issue number which some banks assign when they replace a card, such as a debit card, because it is lost or stolen. It is important to enter the issue number exactly as it appears on the card. For example, an issue number of 0 is different from an issue number of 00, and an issue number of 1 is different from an issue number of 01. Required? An issue number may be required, based on the setting of the Require issue # field for the pay type. If it is required and you do not enter an issue number, the system displays an error message: Credit card issue# () is not valid.  Note: An entry of 00 (two zeros) is not considered a valid issue number.
Start date	<i>Alphanumeric, 2 positions; required or optional based on the Require issue # flag for the pay type.</i> The month and year when the card becomes effective. Required? The Require start date flag for the pay type controls whether the start date is required for the pay type. If the start date is required but not entered, the system displays an error message: Credit card start date (0) is not valid. Even if you require a start date for a pay type, the system does not validate that the start date is on or before the current date. Typically, if your authorization service requires a start date for this pay type, the service would validate that the start date has passed. <i>Numeric, 4 positions (MMYY format): required or optional based on the Require start date flag for the pay type.</i>
Charge sequence	The order in which the system should charge each pay type when the customer uses more than one payment method. Defaults to 2 for a stored value card, or 3 for any other type of credit card. See Determining the Charge Sequence for more information. <i>Numeric, 2 positions; required.</i>

Field	Description
Pay plan (Deferred or installment payment plan)	A code representing a deferred or installment payment plan. Only credit cards whose Card type is Credit card are eligible for payment plans. If the operator does not have authority to the Override Deferred and Installment Billing Options (A81) secured feature, this field is display-only. See Assigning a Payment Plan to the Order for more information on how the system determines the payment plan to assign to an order. Payment plans are defined in and validated against the Flexible Payment Option table. See Working with Flexible Payment Options (WFPO). <i>Alphanumeric, 5 positions; optional.</i>

Instructions:

1. Enter the credit card number in the *Card Number* field.

 Note:

To change the pay type to a different Card type, you should select Exit and enter the new payment method at the [Enter Payment Method Screen](#) or the [Work with Order/Recap Screen](#). See Types of Credit Cards for more information.

2. Enter the date the credit card expires in the *Expiration date* field, using MMY format.
3. Leave the *Amount* field blank if the credit card is the only payment method on the order or if the credit card will serve as the “catch-all” pay type on a multi-pay type order.
4. Optionally, enter an authorization code in the *Authorization #* field to preauthorize (manually authorize) the credit card. You must enter an associated dollar amount to authorize in the *Amount* field. The system updates this field if you use an authorization service to authorize this credit card. You can enter an authorization number in upper and lower case.
5. If you entered an authorization number, enter the date on which you authorized the credit card manually. The system updates this field if you use an authorization service to authorize this credit card.

Since you cannot enter the Authorization Request ID at this screen, Oracle recommends that you instead use the Add Authorization option from the Order Summary page in Modern View to apply a manual authorization.
6. Optionally, enter the CID number defined for the credit card and the CID indicator if you wish to use credit card identification verification.
7. Select OK to attach this payment information to the order.

Screen Option	Procedure
Perform an interactive balance inquiry against a stored value card payment method	Select Balance Inquiry. The system interactively performs a stored value card balance inquiry; see Stored Value Card Balance Inquiry (MSVB). An error message indicates if you have not yet created the stored value card payment method on the order: Must create pay method before Balance Inquiry. An error message indicates if you select this option for a payment method other than stored value card: Pay type not eligible for balance inquiry.

Enter Payment Method Screen

Purpose: Use this screen at any time to enter the payment information.

Screen structure:

- The top of the screen displays the order number, the name of the customer who is placing the order, the accumulated order total across all recipient orders, and the write-off amount overpaid on previous orders. You can apply this amount to the current order.
- The center of the screen displays fields for you to specify payment information for any type of payment method.
- The bottom half of the screen displays the payment methods already attached on the order (either from entries to this screen or from entries to a default payment type pop-up window). You can change or delete any existing payment information on this screen.

How to display this screen: Select Pay Methods on the [Work with Order Screen](#) or the [Work with Order Lines Screen \(Adding Items to the Order\)](#), or the [Work with Order/Recap Screen](#)

Field	Description
WO\$ (Write-off dollars)	The accumulated amount of write-offs (overpayments minus underpayments) for this customer that can be used as payment on the current order when you select Conv w/o \$ to pmt. Indicates whether the customer's write-off balance is positive or negative. The system issues a message if you select Conv w/o \$ to pmt when the write-off balance is 0 or negative: Cannot use as payment; write-off amount is zero or negative. Applying Write-off Dollars as an Order Payment: If the resulting refund/balance due write-off value is positive, the <i>WO\$</i> field is provided on this screen and displays a value that the customer can use as payment on the order. Select Conv w/o \$ to pmt for the system to apply the <i>entire amount</i> of the refund/balance due write-off as payment on the order. The system adds an order payment method on the Payment Method screen using the payment type defined in the Default Cash Pay Type (C07) field in the System Control table. The system issues a refund check for the customer if the addition of the write-off dollars to the order results in an overpayment. Applying Write-off Dollars as Additional Charges: If the resulting refund/balance due write-off value is negative, the <i>WO\$</i> field is provided on this screen and displays a value that you can apply to the order as an additional charge. Select Conv w/o \$ to chrg for the system to apply the entire amount of the refund/balance due write-off as an additional charge on the order. The system will use the additional charge code from the Default Additional Charge Code (C45) field in the System Control table. This amount will be added to the amount the customer owes for the current order. The system will add an additional charge to the Enter Additional Charges Window; the system will convert the negative balance due amount to a positive charge on the order. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>

Field	Description
Pay type	A user-defined code for a method of payment on the order. Valid payment types are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY). All payment methods including PayPal and wallets are shown. As PayPal orders are created via the CWOOrderIn API and not directly through the user interface, hence these pay types should not be selected here. Order Administration does not support authorization integration with PayPal. The pay type code and description display on the lower portion of the screen for payment methods that you have already entered. Assigning a Customer Bill To: The system creates a bill-to automatically for the order and uses the customer's name and address as the billing address when a billing account does not exist for the customer. The bill-to created by the system is <i>attached to the current order only</i>. Restricted payment method: You cannot apply the Order Broker Payment Type (K98) to an order; instead, the screen displays an error, such as Pay type (06-BROKER PAY TYPE) is restricted. <i>Numeric, 2 positions; display-only, required.</i>
Card Number	The number of the credit card or stored value card used on the order. The Scan Credit Card Accounts Screen displays if you prompt on this field and you have defined the credit card pay type associated with the data loaded from GECC in the <i>Pay type</i> field. This screen allows you to scan for the credit card number of the customer placing the order. All cards must be authorized, either manually or by a credit card authorization service. The credit card number is indicated on the bottom half of the screen for credit card payment types that have already been added to the order. Last four: The system stores the last four digits of the actual credit card number in the <i>CC Last 4</i> field in the Order Payment Method table in order to verify the card with the customer. <i>Alphanumeric, 20 positions; required.</i>
Exp date	The date (in MMY format) up until which a credit card is valid. For example, enter 1206 if the credit card expires in December of 2006. The Require expiration date flag for the pay type controls whether this field is a required entry. The expiration date is on the bottom half of the screen for credit card payment types that have already been added to the order. <i>Numeric, 4 positions; required or optional, based on the Require expiration date flag for the pay type.</i>

Field	Description
Issue #	An incremental issue number which some banks assign when they replace a credit card, such as a debit card, because it is lost or stolen. It is important to enter the issue number exactly as it appears on the card. For example, an issue number of 0 is different from an issue number of 00, and an issue number of 1 is different from an issue number of 01. Required? An issue number may be required for a credit card or debit card, based on the setting of the Require issue # field for the pay type. If it is required and you do not enter an issue number, the system displays an error message: Credit card issue# () is not valid.  Note: An entry of 00 (two zeros) is not considered a valid issue number.
Start date	The issue number is a valid entry only for a credit card payment method, such as a debit card. <i>Alphanumeric, 2 positions; required or optional based on the Require issue # flag for the pay type.</i> The month and year when a credit or debit card becomes effective. Required? The Require start date flag for the pay type controls whether the start date is required for a credit card pay type. If the start date is required but not entered, the system displays an error message: Credit card start date (0) is not valid. The start date is a valid entry only for a credit card payment method, such as a debit card. Even if you require a start date for a pay type, the system does not validate that the start date is on or before the current date. Typically, if your authorization service requires a start date for this pay type, the service would validate that the start date has passed. <i>Numeric, 4 positions (MMYY format): required or optional based on the Require start date flag for the pay type.</i>
Plan (Deferred or installment payment plan code)	A code that represents the deferred or installment payment plan you wish to assign to this order. An order is eligible for a payment plan only if it uses a credit card whose <i>Card type</i> is Credit Card) rather than, for example, a stored value card. See Types of Credit Cards for more information. Included only if the Deferred and Installment Billing (F51) system control value is selected. Display-only. An error message indicates if an operator enters a payment plan code and the order is not eligible. See Assigning a Payment Plan to the Order on how the system determines the payment plan to assign to the order. Payment plans are defined in and validated against the Flexible Payment Option table. See Working with Flexible Payment Options (WFPO). <i>Alphanumeric, 5 positions; optional.</i>

Field	Description
Auth #	A code that indicates that the amount to charge for this credit card payment type has been authorized manually or through a credit card authorization service. You can preauthorize a credit card by entering an authorization number in the <i>Authorization #</i> field; however, you must also enter a value in the <i>Amount</i> field. Enter a code in this field to preauthorize the credit card when you do not use an authorization service to evaluate and approve your credit card orders. You can enter an authorization number in upper and lower case. Secured feature: The ability of a user or user class to enter an authorization code manually for an order is controlled by the secured feature C/C Authorization Field Access (A25). If you use an authorization service, the system updates this field when an authorization is received. <i>Alphanumeric, 16 positions; optional.</i>
Authorization date	The date when this payment method received an authorization manually or by an authorization service. You must enter an authorization date if you entered an authorization number in the <i>Authorization#</i> field. If you use an authorization service, the system updates this field when an authorization is received. <i>Numeric, 6 positions (in user date format); optional.</i>
Ord total	The sum of all charges on the order, including: merchandise, freight, additional freight, tax, handling and additional charges. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Auth amt	The amount you wish to manually authorize for this credit card. Since you cannot enter the Authorization Request ID at this screen, Oracle recommends that you instead use the Add Authorization option from the Order Summary page in Modern View to apply a manual authorization. <i>Numeric, 13 positions with a 2-place decimal; required.</i>

Field	Description
Amount	The total dollar value of this payment type. When to enter an amount? Enter an amount for cash/check payment types. If the amount you enter is less than the order total, the system displays the following message: Order total not equal to paid amount. Enter an amount if using a credit card that is not the only form of payment on the order and another payment type is used as the “catch- all” payment type. See Pay Type Editing for more information. When to leave this field blank? Leave this field blank: • when entering a check interface payment type. • when the customer is using only this credit card to pay for the order (the system charges this credit card the total amount due on the order). • for one credit card payment type if the customer is using multiple payment methods on the order (the system charges the credit card the outstanding balance that is not charged to other payment types). The system issues a message for you to delete this amount if: • The customer is using only this credit card to pay for the order, <i>and</i> • You accept the order, <i>and</i> • The dollar amount is insufficient to cover the order. Catch-all payment types: A catch-all payment type is a payment type that will be charged the outstanding balance on an order when the customer is using several payment methods on the order. You can identify a payment type as the catch-all payment type by leaving the <i>Amount</i> field blank. You can only use a credit card (including other card types) as the catch-all payment type. You can identify only one payment type on the order as the catch-all payment type. You cannot identify a cash/check payment type as the “catch-all” payment type, because the customer drafts the check for a specific amount. A “catch-all” payment type, however, will be charged whatever amount is not charged to other payment types on the order. This is an open- ended payment type that will “catch” the customer underpayment, charge the balance, and avoid a balance due situation. <i>Numeric, 13 positions with a 2-place decimal; entry requirements depend on payment type.</i>
Charge sequence	The order in which the system should charge each pay type when the customer uses several payment types. Indicates when each payment type will be billed by the system as merchandise is shipped. See Determining the Charge Sequence for more information. The charge sequence is provided for each entered payment method on the lower portion of the screen, and is enterable. <i>Numeric, 2 positions; optional.</i>

Field	Description
SVC ID #	The ID number for the stored value card payment. Define an ID number only if your stored value card processor supports it. Order Administration stores the ID number in the <i>OPM SVC ID Storage</i> field in the Order Payment Method table and includes it in the authorization request and deposit request sent for the stored value card payment. <i>Numeric, 9 positions; optional.</i>
Pay bal (Payment balance)	The amount remaining to charge on an order. The system uses this calculation to determine the payment balance: $\text{order total} - \text{total order payments} = \text{payment balance}$ Represents the amount charged to the catch all pay type on a multi-pay type order. Example: The order total = 100.00 Pay type 1 = 45.00 Pay type 2 = 15.00 Pay type 3 (catch all) = 0.00 $100.00 - 60.00 = 40.00$ (this is the amount charged to the catch all pay type). This amount is a negative value if the customer overpays or a return or exchange is performed. <i>Numeric, 20 positions with a 2-place decimal; display-only.</i>
Routing	Informational. Enterable only for cash/check pay types. An error message indicates if you enter a routing number for a pay type that does not represent pay category Cash/Check: A routing number cannot be entered for this pay type. <i>Alphanumeric, 9 positions; optional.</i>
Acct (Account #)	Informational. Enterable only for cash/check pay types. An error message indicates if you enter a routing number for a pay type that does not represent pay category Cash/Check: A routing number cannot be entered for this pay type. <i>Alphanumeric, 20 positions; optional.</i>
Check #	Informational. Enterable only for cash/check pay types. An error message indicates if you enter a check number for a pay type that does not represent pay category Cash/Check: A check number cannot be entered for this pay type. <i>Numeric, 6 positions; optional.</i>

Field	Description
Ord discount (Order discount)	The total discount applied to the order across all ship to customers. The total discount is calculated by comparing the selling price with the item/SKU offer price. If you use a price override on any of the order lines, or if it defaults from the Default Price Override Reason (B35) system control value: • If the price override reason code's Override item offer price field is selected, the <i>Ord discount</i> includes any discounts that reduce the selling price from the price override amount you entered for the order line; however, it does not include the amount of the price override itself. For example, if an accompanying item normally priced at \$2.00 is added to the order at no charge, the \$2.00 is not included in the order discount amount. • If the price override reason code's Override item offer price field is unselected, and: – you override an existing item/SKU offer price for the item: the <i>Ord discount</i> includes the difference between the original item/SKU offer price and the final selling price, including the price override and any other discounts. – there is no item/SKU offer price for the item: the order detail line does not affect the <i>Ord discount</i> total.
	 Note: Provided only if the Display Discount on Order Recap Screen (D38) system control value is selected.
CC Last 4	<i>Numeric, 20 positions with a 2-place decimal; display-only.</i> The last four positions of the credit card number. Updates the <i>CC Last 4</i> field in the Order Payment Method table. If you use credit card encryption, the system does not encrypt the value in this field. <i>Alphanumeric, 4 positions; display-only.</i>

When you complete this screen: When you complete the [Enter Payment Method Screen](#), you have identified how the customer will pay for the order, either by using a single payment type or by using a valid combination of payment types. To accept each payment and to display it at the bottom half of the screen, select OK.

At this point, you can:

- Select Exit to return to the previous screen to review the order or add additional item, customer or order information, or
- Select Accept Order, or Acpt/Add Recipient to accept the order and add a recipient order if you have added all items to the order
- Select Reject to reject the order; see [Accepting or Rejecting the Order](#).

Screen Option	Procedure
Change a payment method.	Select Change for the payment method to change it. See Rules for Pay Type Combinations .

Screen Option	Procedure
Delete a payment method.	Select Delete for the payment method to delete it. See Rules for Pay Type Combinations .
Perform online credit card authorization against a credit card payment method.	<i>This option is not available in order entry.</i> An error message indicates: Option is valid only in Order Maintenance See Accepting or Rejecting the Order for more information on performing online credit card authorization during order entry.
Perform an interactive balance inquiry against a stored value card payment method	Select Balance Inquiry for a stored value card payment method. The system interactively performs a stored value card balance inquiry; see Stored Value Card Balance Inquiry (MSVB) . An error message indicates if you enter this option for a payment method other than stored value card: Pay type not eligible for balance inquiry.
Deactivate a payment method.	Select Deactivate for the payment method to deactivate it. See Rules for Pay Type Combinations .
Review order payment history for this order.	Select History for a payment method to advance to the Display Order Payment History Screen .
Review the payment plan assigned to the order.	Select Plan Summary a payment method to advance to the Display Payment Plan Summary Screen .
Accept, validate, and process the order.	Select Accept Order; see Accepting or Rejecting the Order .
Reject (cancel) the order.	Select Reject Order; see Accepting or Rejecting the Order .
Apply the positive write-off balance in the WO\$ field as payment to the order, using the value in the Default Cash Pay Type (C07) field in the System Control table.	Select Convert W/O To Payment.
Apply the negative write-off balance in the WO\$ field as an additional charge on the order, using the value in the Default Additional Charge Code (C45) field in the System Control table.	Select Convert W/O To Charge.
Enter a recipient order.	Select Add Recipient; see Adding a Recipient Order in Order Entry .
Work with Rewards certificates	Not implemented.

 Note:

You will first advance to the [Work with Order/Recap Screen](#) if the [Display Order Recap \(A75\)](#) system control value is selected.

Scan Credit Card Accounts Screen

Purpose: Use this screen to scan for the credit card account the customer wishes to use as payment for the order. This screen displays credit card information for customers with a specific pay type credit card account, such as a house charge account. This screen is helpful if a customer wishes to use the credit card to pay for the order but does not know the credit card number.

In order to view credit card accounts on this screen, you must first:

- Import the data provided by GECC containing the credit card accounts onto your system
- Associate a credit card pay type with the Credit Card Account table.

How to display this screen: Enter the pay type associated with the Credit Card Account table in the *Pay type* field and click on the arrow in the *Credit card number* field on the:

- [Work with Order/Recap Screen](#)
- [Enter Payment Method Screen](#)

An error message indicates if you click on the arrow in the *Credit card number* field and a pay type associated with the house charge has not been defined in the *Pay type* field:

Prompt not valid for this field

Field	Description
Postal code	The postal code or zip code for a customer with this credit card account. Credit card accounts for customers living in foreign countries have a postal code of 00000. Enter a 5-digit postal code to display credit card accounts whose postal codes match your entry. <i>Alphanumeric, 10 positions; optional.</i>
Name	The first 4 positions of the customer's last name. Enter a full or partial last name to display credit card accounts whose last names start with your entry. <i>Alphanumeric, 4 positions; optional.</i>
Address	The first 6 positions of the customer's street address. Enter a full or partial street address to display credit card accounts that match your entry. <i>Alphanumeric, 6 positions; optional.</i>
CC account no. (Credit card account number)	The credit card number of a customer's account. Information will be provided by Oracle at a later date. <i>Numeric, 20 positions; display-only.</i>

Screen Option	Procedure
Select a credit card account	Select a credit card account.
Display a credit card account	Select Display for a credit card account to display it.

Assigning a Payment Plan to the Order

Purpose: A payment plan allows you to pay for the order at a later date.

There are 2 types of payment plans:

- deferred

- installment

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

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

Determining eligible orders: The system determines whether an order is eligible for a deferred or installment payment plan based on this information:

- The [Deferred and Installment Billing \(F51\)](#) system control value is selected.
- The order date is within the starting date and ending date defined for the payment plan. For example, if the starting date for the payment plan is 09/01/06 and the ending date is 09/30/06, the order date must be within the month of September.
- The order does not contain an item that is excluded from deferred and installment payment plans (the [Exclude FPO \(Exclude flexible payment option\)](#) field for the item is selected). For example, if the *Exclude FPO* field for the item BX984 is selected, and the order includes this item, the entire order is excluded from deferred and installment payment plans.
- The source code on the order header is excluded from deferred and installment payment plans (the *Excl FPO (Exclude flexible payment option)* field for the source code is selected). For example, if the *Exclude FPO* field for the source code A102 is selected, and this source code is defined on the order header, the entire order is excluded from deferred and installment payment plans.
- The order meets the minimum dollar amount requirement defined for the payment plan. For example, if the *Minimum amount* field for the payment plan is set to \$50.00, the order total must be equal to or greater than \$50.00 in order to be eligible for this payment plan.
- The order meets the pay type requirement defined for the payment plan. For example, if the *Pay type* field for the payment plan is set to 04 (VISA), the method of payment on the order must be a VISA credit card in order to be eligible for this payment plan.

**Note:**

Only credit cards whose *Type* is Credit card are eligible for payment plans. For example, you cannot apply a payment plan to a stored value card pay type.

Setting up a payment plan: These fields in the Flexible Payment Option table determine how an eligible payment plan is assigned to an order.

- Is the payment plan automatically applied to the order? If the *Auto apply* field for the payment plan is set to:
 - (auto apply), the system automatically applies the most eligible payment plan to the order.
 - (no auto apply), the system does not automatically apply a payment plan to the order. You can apply a payment plan to the order by selecting the *Pay plan* field on the [Work with Order/Recap Screen](#), entering a payment plan code in the *Pay plan* field on the Enter Payment Method screen, or by selecting a payment plan from the Select Payment Plan pop-up window.

- (prompt), the system advances you to the [Select Payment Plan Window](#) where you can select a payment plan to apply to the order.

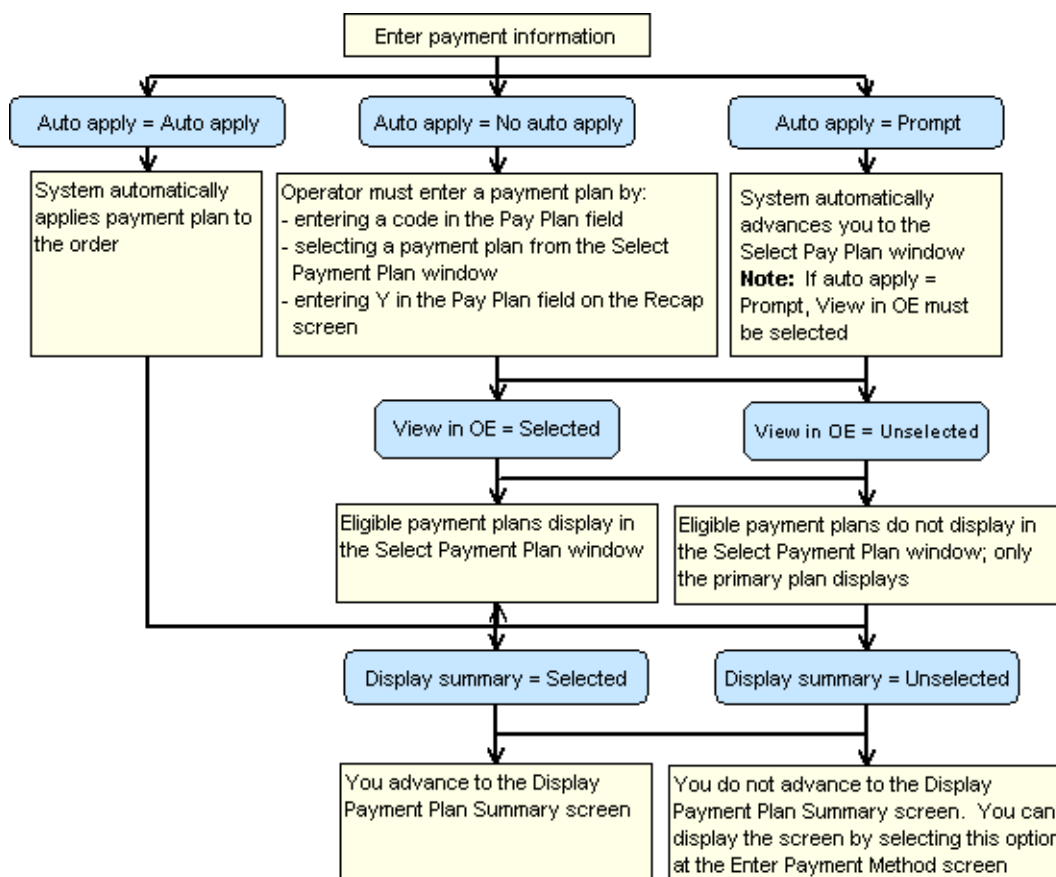
 Note:

In order to make payment plan selection easier, each payment plan should have the same *Auto apply* setting.

- Is the payment plan viewable in order entry and order maintenance? If the *View in oe/om* field for the payment plan is selected and the order is eligible for the payment plan, the plan is indicated in the [Select Payment Plan Window](#). If this field is unselected, the plan does not display in the Select Payment Plan pop-up window; however, you can still apply this plan to the order by entering the code in the *Pay plan* field. The system also displays the primary payment plan in this window regardless of the setting of this field.
- Do you advance to the Display Payment Plan Summary screen? If the *Display summary* field for the payment plan is selected, the system advances you to the [Display Payment Plan Summary Screen](#) when a payment plan is assigned to the order. If this field is unselected, the system does not advance you to the [Display Payment Plan Summary Screen](#), but you can display this screen upon request by using option Pay Plan Summary on the [Enter Payment Method Screen](#).

For more information: See [Deferred/Installment Billing Overview](#) for an overview on deferred and installment payment plans and how to set up payment plans.

Payment plan processing:



Determining the Primary Payment Plan

Once the system determines which payment plans are eligible to assign to the order, the system must then determine the primary payment plan for the order. The primary payment plan is the plan that is the most appropriate for the order based on the information defined for the payment plan and the information defined for the order.

The system uses this hierarchy to determine the primary payment plan for the order:

- The payment plan is set to automatically apply to the order. The system automatically applies a payment plan to the order if the *Auto apply* field in the Flexible Payment Option table is set to 1 (Automatically apply). If more than one payment plan is set to automatically apply or no payment plans are set to automatically apply, the system uses this hierarchy to determine the primary payment plan.
- The payment plan is assigned to a source code. A payment plan is defined in the *Flexible payment code* field for the source code defined on the order.
- An item on the order is defined for the payment plan and the order meets the dollar amount required. An item is defined in the *Item* field in the Flexible Payment Option table and the order meets the minimum dollar amount defined in the *Minimum amount* field in the Flexible Payment Option table.
- An item on the order is defined for the payment plan. An item is defined in the *Item* field in the Flexible Payment Option table.
- The offer on the order is defined for the payment plan and the order meets the dollar amount required. The offer associated with the source code on the order header is defined in the *Offer* field in the Flexible Payment Option table and the order meets the minimum dollar amount defined in the *Minimum amount* field in the Flexible Payment Option table.
- The offer on the order is defined for the payment plan. The offer associated with the source code on the order is defined in the *Offer* field in the Flexible Payment Option table.
- The pay type on the order is defined for the payment plan and the order meets the dollar amount required? The pay type defined on the order is defined in the *Pay type* field in the Flexible Payment Option table and the order meets the minimum dollar amount defined in the *Minimum amount* field in the Flexible Payment Option table.
- The pay type on the order is defined for the payment plan. The pay type defined on the order is defined in the *Pay type* field in the Flexible Payment Option table.
- The dollar amount on the order meets the minimum dollar amount required. The total dollar amount on the order is equal to or greater than the dollar amount defined in the *Minimum amount* field in the Flexible Payment Option table.

If the more than one payment plan meets the same qualifications, the system then determines which payment plan is the primary plan based on:

- The payment plan is the first eligible plan in descending starting date sequence.
- The payment plan is the first alphanumerically.

Selecting the primary plan: Click the plan code to apply the payment plan to the order.

For more information: See Working with Flexible Payment Options (WFPO).

Select Payment Plan Window

Purpose: Use this window to assign a payment plan to the order. This window lists all payment plans that are eligible for this order and are set up to:

- Prompt in order entry (the *Auto apply* field in the Flexible Payment Option table is set to 3) and as viewable in order entry (the *View in oe/om* field in the Flexible Payment Option table is selected).
- Not automatically apply in order entry (the *Auto apply* field in the Flexible Payment Option table is set to 2) and as viewable in order entry (the *View in oe/om* field in the Flexible Payment Option table is selected).

**Note:**

The primary payment plan is indicated in the Select Payment Plan window regardless of the value defined in the *View in oe/om* field.

For more information: See Working with Flexible Payment Options (WFPO).

How to display this window:

- Enter a credit card payment type for the order on the [Enter Payment Method Screen](#) or [Work with Order/Recap Screen](#) if the *Auto apply* field for the payment plan is set to prompt.
- Click on the arrow in the *Pay plan* field on the [Enter Payment Method Screen](#) or [Work with Order/Recap Screen](#).

Field	Description
Plan (Payment plan)	The code for a payment plan that is eligible for this order. Payment plans are defined in and validated against the Flexible Payment Option table. <i>Alphanumeric, 5 positions; display-only.</i>
Description	The description of the payment plan. <i>Alphanumeric, 40 positions; display-only.</i>
D/I (Deferred or installment payment plan)	A code that indicates whether this payment plan is a deferred payment plan or an installment payment plan. Valid values are: D = This is a deferred payment plan. I = This is an installment payment plan. <i>Alphanumeric, 1 position; display-only.</i>

Field	Description
Primary plan	The most appropriate payment plan for this order. The system determines the primary payment plan based on this hierarchy: • payment plan is set to automatically apply • source code • item and dollar amount • item • offer • offer and dollar amount • offer • pay type and dollar amount • pay type • dollar amount • descending starting date sequence • alphanumerically by payment plan code See Assigning a Payment Plan to the Order on how the system determines which payment plan is the most appropriate for the order. <i>Primary payment plan code: Alphanumeric, 5 positions; display-only.</i> <i>Primary payment plan description: Alphanumeric, 40 positions; display-only.</i>
Other qualifying plans	The payment plans that are eligible for this order, but are not the primary payment plan. The system lists the other qualifying payment plans in alphanumeric order. An error message indicates is you select a payment plan other than the primary payment plan and you are not authorized to the Override Deferred and Installment Billing Options (A81) secured feature: Not authorized to override payment plan. <i>Qualifying payment plan code: Alphanumeric, 5 positions; display-only.</i> <i>Qualifying payment plan description: Alphanumeric, 40 positions; display-only.</i>

Display Payment Plan Summary Screen

Purpose: Use this screen to review information related to the payment schedule, such as the billing date if the plan is deferred or the amount due at each installment if the plan is an installment, for the payment plan assigned to the order.

How to display this screen:

- the payment plan assigned to the order is set up as *Display summary* = Selected.
- the operator selects Pay Plan Summary for a payment method on the [Enter Payment Method Screen](#). An error message indicates if you select Pay Plan Summary for a payment method and a payment plan has not been assigned to the order: Pay method is not associated with any payment plan.

Field	Description
Order #	The order number associated with this payment plan. <i>Numeric, 8 positions; display-only.</i>

Field	Description
Pay type	The pay type code and description associated with the payment plan and order. You can only assign a payment plan to an order containing a credit card as the method of payment. See Assigning a Payment Plan to the Order. Pay types are defined in and validated against the Pay Type table. <i>Pay type code: Numeric, 2 positions; display-only.</i> <i>Pay type description: Alphanumeric, 30 positions; display-only.</i>
Payment plan	The payment plan code and description assigned to this order. Payment plan codes are defined in and validated against the Flexible Payment Option table. See Working with Flexible Payment Options (WFPO). <i>Payment plan code: Alphanumeric, 5 position; display-only.</i> <i>Payment plan description: Alphanumeric, 40 positions; display-only.</i>
Sold to	The last, first and middle initial of the sold to customer associated with this order. <i>Last name: Alphanumeric, 25 positions; display-only.</i> <i>First name: Alphanumeric, 15 positions; display-only.</i> <i>Middle initial: Alphanumeric, 1 position; display-only.</i>
Fields associated with a deferred payment plan:	
# of days for deferral	The number of days the customer can defer paying this order. Example: payment due in 30 days. <i>Numeric, 3 positions; display-only.</i>
Deferred bill date	The billing date when the payment for this order is due. The system uses this calculation to determine the deferred bill date: $\text{order date} + \# \text{ of days for deferral} = \text{deferred bill date}$ <i>Numeric, 6 positions (in user date format); display-only.</i>
Fix date for deferral	The fixed billing date when the payment for this order is due. Example: payment due on January 1st. <i>Numeric, 6 positions (in user date format); display-only.</i>
Order total	The sum of all charges on the order, including merchandise, freight, additional freight, tax, handling, and additional charges across all recipients on this order. <i>Numeric, 20 positions with a 2-place decimal; display-only.</i>
Fields associated with an installment payment plan:	
Installment amount	The amount due at each installment. The system uses this calculation to determine the amount due at each installment: $(\text{order total} - \text{prepaid amount}) / \# \text{ of intervals} = \text{installment amount}$ Example: $\text{order total} = 45.00$ $\text{prepaid amount} = 15.00$ $\text{number of installments} = 3$ $(45.00 - 15.00) / 3 = 10.00 \text{ (installment amount)}$ <i>Numeric, 20 positions with a 2-place decimal; display-only.</i>

Field	Description
# of installments	The total number of installments assigned to this payment plan. This is the number of times the customer must pay an installment amount. Example: If the order total is 30.00 and the number of installments is 3, the customer would pay 10.00 at each installment date. <i>Numeric, 2 positions; display-only.</i>
Installment interval	The number of days between each installment deposit date. This number cannot be less than 30 since the billing cycle for a credit card is 30 days. Example: <pre>order total = 30.00 installment amount = 10.00 number of installments = 3 installment interval = 30</pre> In this situation, the customer must pay an installment amount of 10.00 during 3 separate times in 30 day intervals (a payment of 10.00 is due each month). <i>Numeric, 3 positions; display-only.</i>

Field	Description
Installment dates	The dates when each installment amount is due. Installment based on fixed date: - If the current date is less than the fixed day, the system uses this month for the first installment. Example: fixed installment day = 25th current day = 9/10 first installment date = 9/25 - If the current date is equal to or greater than the fixed day, the system uses the next month for the first installment. Example: fixed installment day = 25th current day = 9/28 first installment date = 10/25 Installment based on specific interval: To calculate the first installment date: order date = first installment date To calculate the second installment date: order date + installment interval = second installment date To calculate additional installment dates: previous installment date + installment interval = additional installment date Example: order date = 08/04/06 installment interval = 30 number of installments = 3 First installment date: 08/04/06 Second installment date: 08/04/06 + 30 = 09/03/06 Third installment date: 09/03/06 + 30 = 10/03/06
Fixed installment day	<i>Numeric, 6 positions (in user date format); display-only.</i> The day of the month when each installment amount is due. Example: payments due on the 1st of the month. <i>Numeric, 2 positions; display-only.</i>
Expiration date	The date when this payment plan will no longer apply to new invoices. For deferred payment plans, the Number of days for deferral is added to the invoice date. <i>Numeric, 6 positions (in user date format); display-only.</i>

 Note:

The system calculates the installment dates assuming the order ships on the current date.

Pay Type Editing

Pay type entry requirements and options: This table lists each payment method and identifies the required (R), optional (O), defaulted value (D) and invalid (I) entry fields.

Field	credit card	cash/ check	stored value card	debit card	direct bank disburse
amount	O	R	O	O	O
charge seq	D	D	D	D	D
Card Number	R	I	R	R	D
Exp date	R	I	O	R	I
Issue #	O	I	I	O	I
Start date	O	I	I	O	I
Auth #/ date	O	I	O	O	I
Pay plan	O	I	I	I	I
routing #/ account #	I	O	I	I	R
check #	I	O	I	I	I



Note:

See [Enter Payment Method Screen](#) for more on how the system validates your pay type entries.

Rules for Pay Type Combinations

The system allows only these payment type combinations:

- Enter a value in the *Amount* field for a credit card payment type (including other card types) only if you use more than one credit card on the order, and the other card is the “catch-all” payment.
- Leave the *Amount* field for the credit card (including other card types) blank if you use a single credit card on an order with a cash/check payment type; otherwise, the system does not allow you to accept the order and displays a message: At least one 'catch-all' payment method must be defined.

To change: Select Change for a payment type at the [Enter Payment Method Screen](#) or [Work with Order/Recap Screen](#) to change existing payment information. A window opens automatically for the selected payment type; you can change any information on this window.

To delete: Select Delete for the payment type you want to remove from the order.

To deactivate: Select Deactivate for an authorized or billed credit card payment type that you want to disable from further billing only. This allows you to stop any further billing against a stolen credit card.

You receive a message if you attempt to deactivate a credit card that has not been authorized or billed: Pay method has no activity -- delete instead.

If the credit card is eligible for deactivation, a window opens on the [Enter Payment Method Screen](#) when you select OK.

Confirm Deactivation

Press Enter to confirm deactivate.

When you select OK, the system:

- updates the *Chg seq* (charge sequence) field with a value of 99; you cannot change or reactivate the deactivated payment type.
- displays a message if you deactivate the payment type on a single paytype order. The only pay method on the order has been deactivated.
- instructs you to define an alternate method of payment. You must also update another payment type if you are deactivating the “catch-all” payment type on the order.
- creates an authorization reversal if the payment is a stored value card and an open, unused authorization amount exists against the payment; see [Stored Value Card Authorization Reversal](#).

**Note:**

You cannot deactivate a credit card with a refund due; instead, you must use the Work With Refunds option to cancel the refund for the order or change the refund type. See Working with [Refunds, Writeoffs and Balances Due \(WREF\)](#).

Determining the Charge Sequence

Purpose: You can use the charge sequence field to indicate the order in which the system should charge payment methods on an order with multiple pay types. A lower charge sequence indicates to charge that payment method first. For example, you enter an order with a stored value card and a credit card: the stored value card has a charge sequence of 2, indicating to charge it first, and then the credit card. The payment method with the highest charge sequence must be the “catch-all,” as described above under [Pay Type Editing](#).

The system automatically assigns charge sequences to different payment categories as follows:

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

Reassigning charge sequences: You can assign a different charge sequence to a payment method in order entry. If the payment method is not the “catch-all,” the system then reassigns the charge sequence for the “catch-all” so that it is higher. For example, if you change the charge sequence for a stored value card to 10, the system automatically changes the charge sequence for the credit card on the order to 11 (provided the credit card is the “catch-all”).

In the above example, if you changed the charge sequence of the stored value card to 98, you would not be able to accept the order. Instead, the system displays the following error message: At least one 'catch-all' pay method must be defined.

The reason the system displays this message is that a charge sequence of 99 indicates to deactivate the payment method, and you cannot deactivate the “catch-all.” Instead, use the [Enter Payment Method Screen](#) to reassign the charge sequences so that the “catch-all” has the highest charge sequence, but it is lower than 99.

Completing Order Entry

Alternate Shipping Charges by Via Window

Purpose: Use this window to review additional ship via choices with the customer, and allow the customer to select a different ship via based on total freight charges or delivery date.

Ship via overrides: There are several ways the system can override the shipper specified on the order with another shipper. See [Ship Via Override Hierarchy](#) for a list of ways the system can override the shipper specified on the order with another shipper and the hierarchy in which the ship via overrides take precedence.

How to display this window: This window opens automatically if:

- there are any ship vias for the shipper identified with a *Type* of O in the Best Way Ship Via table
- there is at least one reserved item on the order
- the [Best Way Ship Via for Auto-Assignment \(J67\)](#) system control value is blank

See [Working with Best Way Ship Vias](#) for an overview and setup instructions.

This window also opens automatically in order maintenance if:

- the [Display Alternate Shipping Charges by Via Window in OM \(I02\)](#) system control value is selected
- no items on the order are printed or shipped
- the Best Way Ship Via for Auto-Assignment (J67) system control value is blank

Auto-assignment? This window does not open if the [Best Way Ship Via for Auto-Assignment \(J67\)](#) system control value is set to a valid ship via code; in this situation, the system automatically assigns the best way ship via with the lowest overall shipping charges to the order. See the Best Way Ship Via for Auto-Assignment (J67) system control value for an overview.

Field	Description
Ship via	The shipper to deliver the order. The current ship via on the order is indicated at the top of the window, with each of the possible alternate shippers below. <i>Code: numeric, 3 positions; display-only.</i> <i>Description: alphanumeric, 30 positions; display-only.</i>
Charges	The total freight charges on the order for this ship via, including: • Add'l freight charge • shipper/item charges (see Work with Ship Via/Item Screen) • service charges (see Work with Dollar Chart by Ship Via Screen (Ship Via Service Charges)) • weight charges (see Work with Weight Charges by Ship Via Screen) The charges also include any special handling charges on the order if the system control value Include Special Handling in Alternate Shipping Charges by Via (I03) system control value is selected. <i>Numeric, 20 positions with a 2-place decimal; display-only.</i>

Field	Description
Ship lead days	The total number of days to add to the current date to determine expected delivery date. Calculated how? Calculated by adding the Shipping lead days for the SCF/ship via + the number of days specified in the Pick Processing Days (B37) system control value. Additional factors for shipping lead days: Two additional factors, either separately or combined, can increase the shipping lead days: the system adds 1 day if the current time is later than the Warehouse Cutoff Time (K39), or adds 2 days if the total lead days based on the previous factors results in an expected delivery date after Friday of the current week and the Use Business Days When Calculating Expected Delivery Date (K38) system control value is selected, indicating that shipments do not occur on Saturday or Sunday. Future arrival dates: Even if the Arrival date on the order is later than the result of the expected delivery date calculation, the shipping lead days still indicate the total number of days required to process the order. If the expected delivery date is blank: If there are no reserved lines on the order, then the expected delivery dates for all displayed ship vias are blank. See the description of the <i>Expected delivery date</i>, below, for a discussion and an example. <i>Numeric, 3 positions; display-only.</i>

Field	Description
Expected delivery date	The date when the customer can expect to receive the shipment using this ship via, calculated by adding the order date to: - the Shipping lead days for the SCF/ship via - number of days specified in the Pick Processing Days (B37) system control value 1 (if the current time is later than the Warehouse Cutoff Time (K39)) 2 (if the total lead days based on the previous factors results in an expected delivery date after Friday of the current week and the Use Business Days When Calculating Expected Delivery Date (K38) system control value is selected, indicating that shipments do not occur on Saturday or Sunday) Example: Order date = 6/4 (Monday) Shipping lead days = 4 Pick processing days = 1 Current time = 4:00 p.m., and warehouse cutoff = 15:00 (3:00 p.m.) Use Business Days When Calculating Expected Delivery Date = selected The system adds 8 days to 6/4 (4 shipping lead days + 1 pick processing day + 1 day for warehouse cutoff + 2 days for weekend, so the expected delivery date is Tuesday, 6/12. Future arrival dates: If the Arrival date on the order is later than the <i>Order date</i>, then the expected delivery date displayed is never sooner than the <i>Arrival date</i>, regardless of the result of the above calculation. For example, if the result of the above calculation is 6/12, but the arrival date is 6/30, then the displayed expected delivery date is 6/30. If the expected delivery date is blank: If there are no reserved lines on the order, then the expected delivery dates for all displayed ship vias are blank. <i>Numeric, 6 positions (in user date format); display-only.</i>

Completing this window: Select a ship via to replace the current ship via on the order, or click Exit to retain the current shipper.

Work with Order/Recap Screen

Purpose: Use this screen to enter the payment method(s) for an order and review important information.

Screen structure:

- The center of the screen displays customer and address information for the customer who is placing the order (sold-to customer) and the customer who is receiving the order (recipient customer or "ship-to" customer). Also, this part of the screen displays several order-related fields that you can update before ending the order.

This information is repeated on this screen so that you can reiterate this information to the customer. This allows you one last chance to change this information before you accept the order.

- The bottom of the screen displays fields for you to specify payment information for any type of payment method, namely:
 - Cash/check

- Credit card (including other card types)
- The right-hand portion of the screen displays the value of the order in the *Total* field; the individual charges on the order display in these fields:
 - Merchandise
 - Freight
 - Additional freight
 - Tax
 - Handling and duty
 - Additional charges

This screen includes entry fields for credit card and cash/check payment types because this is targeted to customers who pay for their orders this way.

Additionally, this screen includes any payment information that you entered in a default payment type pop-up window or on the [Enter Payment Method Screen](#).

You can enter up to 4 payment types on this screen.

**Note:**

This screen does not provide a means to delete a payment type from the order, change the charge sequence, or enter an issue number or start date for any payment method that is not a debit card. You must select Payments to access the [Enter Payment Method Screen](#) and select Delete for the payment type you wish to remove.

Adding an alternate pay type: Use the alternate pay type field at the bottom of the Pay Type area of this screen to add any additional payment method to the order. A pop-up window opens for the specified payment type which you must complete to add the payment method to the order. See the field descriptions for the [Enter Payment Method Screen](#) for further details.

When opens?

- Select Accept Order at the [Work with Order Lines Screen \(Adding Items to the Order\)](#) and
- The system control value, [Display Order Recap \(A75\)](#), is selected.

Field	Description
Hold (Hold reason)	A code to place an order on hold for any reason. See the description of the hold reason field on the Work with Order Screen for a complete description. If you have already entered a hold reason, it will display here; however, you can also enter or change a hold reason code on the recap screen. <i>Alphanumeric, 2 positions; optional.</i>
Sold-to # (Sold-to customer number)	The number assigned by the system to identify the customer who is placing the order. <i>Numeric, 9 positions; display-only, assigned by the system.</i>

Field	Description
Sold-to name (Sold-to customer name and address)	The name, or company name, and address of the customer placing the order. A plus sign (+) indicates that there is additional address information in lines 3 or 4 of the address; see Expanding the Address in Order Entry. <i>Alphanumeric, 30 positions.</i>
Delivery	The type of delivery address. Valid values are: • Business = Business rate table determines shipping charges. • Residential = Residential rate table determines shipping charges. • No Distinction = This is not a valid value for UPS shippers.  Note: The system defines the shipper on an order as U.P.S. if the <i>Type</i> field in the Ship Via table = U; see Working with Ship Via Codes (WVIA).
Ship-to	<i>Display-only.</i> The name, or company name, and address of the customer to receive the order. If there is extended ship-to customer address information that does not display, this is indicated by a plus sign: (+). <i>Alphanumeric, 30 positions.</i>
Wgt (weight)	The total Sell wgt. (Selling weight) of the items on the order. <i>Numeric, 7 positions with a 3-place decimal.</i>
Via	A code for the shipper to deliver this order to the customer. The system may have changed the ship via based on a ship via override that applied to this order; see Ship Via Override Hierarchy. Reviewing eligible ship vias and optionally selecting an override: You can prompt on this field to advance to the Valid Ship Vias for Window, where you can review valid ship vias for the order, including their overall shipping charges and expected delivery dates; optionally, you can select an override ship via. <i>Numeric, 2 positions; required.</i>
Priority (Reservation priority)	A number in the range of 0-9 that designates the priority for backorder or order fulfillment, where • 0 = Lowest priority • 9 = Highest priority A value defaults to this field if a priority was entered in the B/O priority (Backorder priority) field for the source code; and the header-level value, in turn, defaults to the Priority field on the order detail line. <i>Numeric, 1 position; optional.</i>

Field	Description
Arrival date	The date when the customer wants to receive this order. The default value is the current date. If you enter an override to the arrival date, the system automatically updates the order <i>Priority</i> to 9 (Highest priority) if the Auto Update Order Priority (G45) system control value is selected. <i>Numeric, 6 positions (in user date format); required.</i>
Source	A code that: • Traces the origin of the customer's order • Determines the freight and pricing methods and discounts available on the order. <i>Alphanumeric, 9 positions; display-only.</i>
PO#	The customer's purchase order number. <i>Alphanumeric, 15 positions; optional.</i>
Credit Card payment type (Unlabeled entry field before the card number)	Enter a user-defined code for a credit card payment type. If you attempt to enter a non-credit card payment method in the first payment type field, the screen displays an error message: Pay type must be credit card. Pay types are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY). Issue number and/or start date: If the payment method you enter is a debit card (a credit card pay type with the Card type set to D), you advance automatically to the Enter Credit Card For Window (Credit Card Payment Type), where you can enter the issue number and/or start date. However, you will not be able to enter the issue number or start date for any other payment method from this screen, regardless of the settings of the Require start date or Require issue # for the pay type; you will need to use the Enter Payment Method Screen instead. <i>Numeric, 2 positions; display-only.</i>
Card Number	The number of the credit card used on the order. Information will be provided by Oracle at a later date. <i>Alphanumeric, 20 positions; required.</i>
Expire Date	The date (in MMY format) up until which a credit card is valid. For example, enter 1206 if the credit card expires in December of 2006. The Require expiration date flag for the pay type controls whether this field is a required entry. <i>Numeric, 4 positions; required or optional, based on the Require expiration date flag for the pay type.</i>

Field	Description
Pay plan (Deferred or installment payment plan code)	A code that represents the deferred or installment payment plan you wish to assign to this order. Only credit cards whose Card type is C are eligible for payment plans. Included only if the Deferred and Installment Billing (F51) system control value is selected. If an operator does not have authority to the Override Deferred and Installment Billing Options (A81) secured feature, this field is display-only. An error message indicates if an operator enters Y in this field and the order is not eligible. See Assigning a Payment Plan to the Order on how the system determines the payment plan to assign to the order. Payment plans are defined in and validated against the Flexible Payment Option table. See Working with Flexible Payment Options (WFPO). <i>Alphanumeric, 5 positions; optional.</i>
Auth# (Authorization number)	A code that indicates that the amount to charge for this credit card payment type has been authorized manually or through a credit card authorization service. You can pre-authorize a credit card by entering an authorization number in the <i>Authorization #</i> field; however, you must also enter a value in the <i>Amount</i> field. Enter a code in this field to pre-authorize the credit card when you do not use an authorization service to evaluate and approve your credit card orders. You can enter an authorization number in upper and lower case. Secured feature: The ability of a user or user class to enter an authorization code manually for an order is controlled by the secured feature C/C Authorization Field Access (A25). If you use an authorization service, the system updates this field when an authorization is received.
	 Note: Only the first 7 positions of the authorization number display on the Work with Order/Recap screen.
SVC ID #	<i>Alphanumeric, 16 positions; optional.</i> The ID number for the stored value card payment. Define an ID number only if your stored value card processor supports it. Order Administration stores the ID number in the <i>OPM SVC ID Storage</i> field in the Order Payment Method table and includes it in the authorization request and deposit request sent for the stored value card payment. <i>Numeric, 9 positions; optional.</i>
Alternate payment type (Unlabeled entry field below the Credit Card payment type)	Enter a user-defined code for a cash/check payment type. Valid pay types are defined in and validated against the Pay Type table. <i>Numeric, 2 positions; display-only.</i>

Field	Description
Description (Unlabeled field)	The description associated with this payment method, as defined in the Pay Type table. <i>Alphanumeric, 30 positions; display-only, updated by the system.</i>
Amount	The total dollar value of the alternate payment type, as defined on the pop-up window. <i>Numeric, 13 positions with a 2-place decimal; entry requirements depend on payment type.</i>
Merch (Merchandise)	The total value of merchandise on this order. This does not include freight, additional charges, tax (except for hidden tax; see the Tax field), duty, handling, or sold out items. The value in the <i>Merch</i> field is the grand total of the item price on the line multiplied by the quantity ordered. Order-level discounts: Select Reprice when you finish entering the order to calculate any end-of-order pricing discounts, including promotional pricing. Line-level discounts: The system calculates any line-level discounts (such as the Disc %) line-by-line, as you enter each item. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Frt (Freight)	The total charge for shipping this order. The system performs this calculation based on the freight method defined for the source code on the order. This total may depend on the quantity or weight of items ordered or on the dollar value of the order as a whole. If the system calculates freight as a percentage of the merchandise charges, there might be a penny variation in total freight amount due to rounding differences. You can also define a freight override for the order ship to on the Work with Order Ship to Properties Screen. Freight Methods: Working with Source Codes (WSRC) discusses each freight method and freight calculation. Additional Charges: Does not include any additional charges associated with shipping this item (see the Frt+ (Additional freight charges) field for these totals). Service and Weight Charges by Ship Via: Includes any service charges by ship via or order weight charges by ship via. See Working with Ship Via Codes (WVIA). When the Freight Field is Blank: - The <i>Frt</i> field is blank if the Calc freight (Calculate freight) field is unselected to indicate that freight will not be calculated for this order. - The system calculates freight by order weight during repricing, the initial and final order accept, and when you select to change the last line on the order if you do not change its order quantity. The <i>Freight</i> field on the order does not include order weight freight charges as you add lines to the order; however, the system does display ship via service charges and ship via weight charges immediately. When the system calculates freight by order weight, the system updates the <i>Freight</i> field for the order with the complete freight amount. See Freight by Order Weight Calculation Logic and Examples. <i>Numeric, 7 positions with a 2-place decimal; display-only, updated by the system.</i>

Field	Description
Frt+ (Additional freight charges)	The total dollar amount for additional freight charges on the order, above regular shipping charges. The value in the <i>Frt+</i> field includes the additional freight charges defined for the shipper(s) on the order. For example, the shipper may charge a premium (additional shipping charges) for overnight shipments or Federal Express deliveries. Depending on how the shipper is defined, the customer may be charged additional shipping charges (in the <i>Frt+</i> field) and system-calculated shipping charges (in the <i>Frt</i> field) or just the additional shipping charges. The Add'l freight charge field for the Ship Via defines the additional freight charge. The system adds the additional shipping charge to an order only when the merchandise amount is less than or equal to the value in the <i>\$Limit</i> field for the shipper. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i> Note: See the field description under Reviewing Order Totals for more information on the Tax, Hnd, Chg, and Total fields.
Tax	The total sales tax on the current order. The value in the <i>Tax</i> field is based on the value of merchandise on the order plus any taxable freight and special handling charges. Tax does not accumulate in this field on orders subject to VAT. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Hnd (Handling charge)	The total charge for special handling or gift wrapping. Also includes any duty charges on the order. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Chg (Additional charges)	The total extra charges added to the current order. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Total (Order total)	The sum of all charges on the order, including: merchandise, freight, additional freight, tax, handling, and additional charges. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>

Field	Description
Discount	The total discount applied to the order across all ship to customers. The total discount is calculated by comparing the selling price with the item/SKU offer price. If you use a price override on any of the order lines, or if it defaults from the Default Price Override Reason (B35) system control value: • If the price override reason code's Override item offer price field is selected, the <i>Ord discount</i> includes any discounts that reduce the selling price from the price override amount you entered for the order line; however, it does not include the amount of the price override itself. For example, if an accompanying item normally priced at \$2.00 is added to the order at no charge, the \$2.00 is not included in the order discount amount. • If the price override reason code's Override item offer price field is unselected, and: – you override an existing item/SKU offer price for the item: the <i>Ord discount</i> includes the difference between the original item/SKU offer price and the final selling price, including the price override and any other discounts. – there is no item/SKU offer price for the item: the order detail line does not affect the <i>Ord discount</i> total.  Note: Included only if the Display Discount on Order Recap Screen (D38) system control value is selected. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
G/M (Gross profit margin)	The unit amount of the order's merchandise that exceeds the cost of all of the item's on the order. You can use gross margin to determine the profit of an order based on each item's selling price. See Determining Gross Profit for more information on the calculations the system performs to determine gross margin and gross margin percentage. The Display Gross Margin (A65) secured feature controls whether this field is included in order entry, maintenance, inquiry and item availability. <i>Numeric, 5 positions with a 2-place decimal; optional.</i>
G/M% (Gross profit margin percent)	The percentage of the order's merchandise that exceeds the cost of all of the item's on the order. You can use gross margin to determine the profit of an order based on each item's selling price. See Determining Gross Profit for more information on the calculations the system performs to determine gross margin and gross margin percentage. The Display Gross Margin (A65) secured feature controls whether this field is included in order entry, maintenance, inquiry and item availability. <i>Numeric, 7 positions with a 2-place decimal; optional.</i>

When you complete this screen: When you complete this screen, you have identified how the customer will pay for the order, either by using a combination of credit card, cash/check, or stored value card payment types or any alternate payment type.

You have also identified who is placing the order and the items being bought. This is the only information required to add an order to the system.

At this point, you can:

- Select any of the function keys listed at the bottom of the screen, *or*
- Select Accept Order to accept the order (see [Accepting or Rejecting the Order](#)), *or*
- Select Reject Order to reject the order (see [Accepting or Rejecting the Order](#)).

Screen Option	Procedure
Accept the order	Select Accept Order. See Accepting or Rejecting the Order .
Reject the order	Select Reject Order. See Accepting or Rejecting the Order .
Add a recipient	Select Add Recipient.

 Note:

You will first advance to the [Work with Order/Recap Screen](#) if the [Display Order Recap \(A75\)](#) system control value is selected.

Work with additional charges on the order	Select Additional Charges to advance to the Enter Additional Charges Window .
Work with customer ship-to information	Select Address Book to advance to the Select Ship To Window .
Work with customer bill-to information	Select Bill To to advance to the Change Customer Bill To Screen (Selecting, Changing, or Excluding a Billing Account) .
Return to the Work with Order Lines screen	Select Detail to advance to the Work with Order Lines Screen (Adding Items to the Order) .
Work with the extended address for the sold-to customer	Select Expand Address to advance to the Expand Name/Address Screen .
Work with order messages	Select Messages to advance to the Work with Order Messages Screen .
Display more options	Select More Options to advance to the Display More Options Screen .
Work with order ship-to information	Select One Time Ship To to advance to the Create One Time Ship To Address Screen .
Advance to the Order Header screen	Select Order Header to advance to the Work with Order Screen .
Advance to the Enter Payment Method screen	Select Pay Methods to advance to the Enter Payment Method Screen .
Advance to the Work with Order Ship To Properties screen	Select Properties to advance to the Work with Order Ship to Properties Screen .
Advance to the Display Order Summary screen	Select Summary to advance to the Display Order Summary Screen .

Accepting or Rejecting the Order

- [Rejecting the Order](#)

- [Confirm Order/Call Disposition Window](#)
 - [Confirm Reject Window](#)
- [Accepting the Order](#)
 - [Performing Online Credit Card Authorizations](#)
 - [Confirm Invalid Expiration Date Screen](#)

Rejecting the Order

When you select Reject Order, the system looks at the setting of the [Capture Order/Call Disposition \(K03\)](#) system control value to determine how to proceed.

- If this system control value is set to ORDER or ALL, the system advances you to the [Confirm Order/Call Disposition Window](#) where you must enter a reject reason code explaining why you are rejecting the order. In addition, the system creates a record in the [Order Disposition Table](#) so that you can track order/call disposition activity; see [Tracking Order/Call Disposition Activity](#).
- If this system control value is set to NONE or blank, the system advances you to the [Confirm Reject Window](#) where you must select OK in order to proceed with the order rejection.

Confirm Order/Call Disposition Window

Use this window to enter the reason why you reject an order in interactive Order Entry or end a call received from an external order call center.

How to display this screen: The setting of the Capture Order/Call Disposition (K03) system control value controls when this window displays.

- If this system control value is set to ORDER, this window displays when you reject an order during interactive Order Entry.
- If this system control value is set to ALL, this window displays when you:
 - reject an order during interactive Order Entry.
 - end a call received from an external order call center or select Exit at the [Select Customer Sold To For Order Screen](#) if a *Universal call ID* has been captured for the call in the Order Disposition table.

Field	Description
Reject reason	A code for the reason you are rejecting an order or ending a call from an external order call center. You can prompt on this field to advance to the Select Reject Reason screen, where you can select a valid order/call disposition reject reason code; additionally, if you have authority to the Work with Reject Reason Codes (WWRR) menu option, you can create a new reject reason.

 **Note:**

If you prompt on this field and select a reject reason code at the Select Reject Reason screen, the system immediately rejects the order or ends the call and does not return you to the Confirm Order/Call Disposition window.

Order/call disposition reject reason codes are defined in and validated against the Reject Reason table; see [Working with Order/Call Disposition Reject Reason Codes \(WWRR\)](#).

Alphanumeric, 2 positions; required.

Screen Option	Procedure
Reject the order or end the call from an external order call center	Select Reject. The system: - captures the reject reason you enter at this window in the Order Disposition Table. - returns you to the screen where you were located before entering the order or taking the call from the external order call center.
Return to the order	Select Exit. The system returns you to the order.

 **Note:**

This option only displays when you reject an order; this option does not display when you exit a call from an external order call center.

Confirm Reject Window

Use this window to confirm that you wish to reject the order.

How to display this screen: This window displays when you:

- reject an order during interactive Order Entry if the Capture Order/Call Disposition (K03) system control value is set to NONE or blank.
- reject an order during Batch Order Entry.

- reject an order batch at the [Work with Error Orders Batches Screen](#).
- reject a business to business order.

Screen Option	Procedure
Reject the order	Select Reject. The system returns you to the screen where you were located before entering the order.
Return to the order	Select Exit. The system returns you to the order.

Accepting the Order

When you select Accept Order:

1. The system verifies the accuracy of all order information and ensures that you have defined some method of payment.
2. The system adds the new order immediately to the Order tables; it becomes available for Order Maintenance or Order Inquiry.
3. The system sends the credit card payment method on the order to the authorization service if you are set up to perform online credit card authorizations; see [Performing Online Credit Card Authorizations](#).
4. A scrolling message similar to the following displays at the bottom of the screen:
Finalizing order, Finalizing order.
5. Several updates occur; see [Order Entry Updates](#).
6. You return to the Select Customer Sold To screen to enter another order or to end the Order Entry function.

Payment plan error message: An error message indicates if you select Accept Order for an order associated with a payment plan and the order includes more than one credit card:
Multiple credit cards not allowed with payment plan.

See [Working with Flexible Payment Options \(WFPO\)](#) for more information on deferred and installment payment plans.

Store pickup error messages: If the order is flagged for store pickup, the system confirms that all items have been flagged and that there are no non-credit card payment methods on the order. See [Troubleshooting Creation of Store Pickup Orders and Things to Note](#) for more information.

Ship-for-pickup error message: If the [Payment at POS for Ship for Pickup Orders \(L60\)](#) system control value is selected and this is a ship-for-pickup order that does not match the [Order Type for Special Orders \(L15\)](#), the system confirms that any payment methods on the order are credit cards whose *Card type* fields are set to Credit. If not, an error message indicates: Invalid pay type for ship for pickup order. You need to change the payment methods before you can accept the order. See [Payment at POS for Ship for Pickup Orders \(L60\)](#) for more information.

Performing Online Credit Card Authorizations

Online credit card authorization allows you to send and receive electronically the information required to authorize a credit card at the time the order is placed instead of at the time the pick slip is generated for the order.

The system performs online authorization when you select Accept Order after determining if the order should go on hold. Note that online authorization still takes place, even if the order is on hold, provided that the order is eligible for online authorization.

If the order is eligible to receive a credit card authorization during order entry, the system sends the amount requiring authorization to the authorization service and waits for a response.

There are 3 types of responses you can receive from the authorization service.

- R = an authorization response was received, such as declined or approved.
- T = the program timed out before an authorization response was received.
- U = an undefined response was received.

Additionally, the authorization service sends back an response code, authorization code, AVS response code (if you are performing AVS verification), CID response code (if you are performing credit card identification verification), and date.

If you have defined a pop up window message for the vendor response received, you advance to the [Select Authorization Response Option Window](#). Also, if you have specified vendor response, the system places the order on hold.

**Note:**

The Select Authorization Response Option window opens once for each authorization transaction; if you receive an authorization response, AVS response, and CID response from the authorization service, an authorization pop up window displays the first response (in the order listed).

Credit cards requiring authorizations less than \$1.00: If the credit card amount to authorize is less than \$1.00 and the [Authorization Number for Authorizations Under \\$1.00 \(I08\)](#) system control value specifies an authorization number, the system does not send the credit card to the service bureau for authorization; instead, it assigns the authorization number from the system control value. If the system control value is blank, the system sends the credit card to the service bureau for authorization, regardless of the amount that requires authorization.

Performing Online Verification Only: If the [Online Auth Verification Only \(I96\)](#) system control value is selected, the system processes online authorizations for \$1.00 for the purpose of validating the card. During batch authorizations, the system authorizes the card for the shippable dollar amount and voids the online authorization for \$1.00.

Oracle Retail Customer Engagement stored value cards: When using the [Customer Engagement Stored Value Card Integration](#), if the Oracle Retail Customer Engagement stored value card is the only payment on the order and the amount authorized for the card is less than the order total, Order Administration updates the amount for the card with the amount authorized and displays the message `Insufficient balance on card - please add another payment`. In order to accept the order, you must add another payment to the order to cover the amount of the order that is not covered by the Oracle Retail Customer Engagement stored value card. Example: If the order total is 500.00 and the amount authorized for the Oracle Retail Customer Engagement stored value card is 236.20, the system updates the amount for the card to 236.20 and requires another form of payment to cover the remaining 289.55 balance on the order.

For more information: See [Performing Online Credit Card Authorizations](#) for an overview of the online credit card authorization process and the required setup.

Confirm Invalid Expiration Date Screen

This screen opens if the expiration date for the credit card expires before the credit card payment method assigned to the order has been paid in full, for example, the credit card expiration date is 10/06 and an installment payment plan is assigned to the credit card payment method with installment dates of 9/8/06, 10/8/06 and 11/8/06.

Field	Description
Correct expiration/Start date	Indicates whether you wish to change the expiration date for the credit card or change the payment method assigned to the order. Valid values are: • Yes = Correct the expiration date or change the payment method assigned to the order. • No = Do not correct the expiration date or change the payment method assigned to the order.

Instructions:

To correct the credit card expiration date or start date.

1. Select Yes from the *Correct expiration/start date* field if you wish to change the credit card expiration date or the credit card payment method assigned to the order, *or*
2. Select OK.
3. The system returns you to Order Maintenance, where you can correct the payment method.

**Note:**

If you selected Yes from the *Correct expiration/start date* field, you must change the expiration date or payment method assigned to the order or the system will advance you to this screen again when you select Accept Order.

Order Entry Updates

Purpose: The system performs updates to a number of tables to reflect the addition of a new order to the system. The updates occur:

- Immediately (interactively), as you enter an order; see [Immediate Updates](#)
- When you select Accept Order; see [Updates at Accept](#)
- When the Order ASYNC job receives an order processing data queue record; see [Updates During Background Processing](#) for more information about which fields are updated in each table.

Immediate Updates

The system updates the SKU and Item/Warehouse tables immediately (interactively) as you enter a new order.

Process	Table	Field
Update the Item/Warehouse for each item ordered	Item/ Warehouse	On-hand quantity (if express-billed order) Item/warehouse backorder quantity Reserve quantity Special handling reserve quantity Item/warehouse on-order quantity
Update the SKU for each item ordered	SKU	Orders availability pick generation Open quantity On-hold quantity

Additionally, the system updates these tables as you enter a new order:

- Alternate Customer # Cross Reference (if you are creating a new customer, and the [Assign Alternate Customer # \(I88\)](#) system control value is selected)
- Customer Sold To
- Customer Sold To Extended Address
- Customer Sold To Phone #
- Customer Bill To
- Customer Bill To Extended Address
- Customer Bill To Phone #
- Customer Ship To
- Customer Ship To Extended
- Customer Ship To Phone #
- Customer Action Notes
- Order Additional Charges
- Order Batch
- Order Coupon Discount
- Order Detail
- Order Detail Coupon
- Order Detail Data Queue
- Order Free Gift
- Order Header
- Order I/T Lines
- Order Information
- Order Line History
- Order Line Message
- Order Message

- Order Payment Method
- Order Pending Checks
- Order Selected Item
- Order Ship To
- Order Ship To Address
- Order Ship To Data Queue
- Order Special Format
- Order Special Handling
- Order Transaction History
- Reserved Order Lines

Updates at Accept

The system performs these table updates when you select Accept Order. See [Performing the Release](#) and [Introducing Order Hold Reason Codes](#) for more information about the credit check process that evaluates customers, orders, and payment types and performs record updates if any condition on the order fails a credit check.

Process	Table	Field
Reprice order if the Price method field for the Source Code is set to D (Regular Item Pricing + Repricing)	Order Detail	Order detail price
Evaluate free gift eligibility, based on the source code or offer; create order detail records for free gift, if applicable	Order Detail	All fields
Calculate the \$ Discount, based on Source or Offer; add a record to the Order Additional Charges table	Order Additional Charges	All fields
Credit check: sold-to customer unconditional hold	Order Header SKU	Order header/order hold reason system hold reason On-hold quantity
Credit check: sold-to customer fraud	Order Header Order Header SKU	Order header order status Order header/order hold reason system hold reason On hold qty
Credit check: sold-to customer zip code fraud	Order Header Order Header SKU	Order header order status Order header/order hold reason system hold reason On-hold quantity
Credit check: bill-to customer unconditional hold	Order Header SKU	Order header/order hold reason system hold reason On-hold quantity
Credit check: bill-to customer zip code fraud	Order Header SKU	Order header/order hold reason system hold reason On-hold quantity

Process	Table	Field
Credit check: ship-to/sold-to customer fraud	Order Ship To Order Header Order Ship To SKU	Order ship to/order hold reason hold reason Order header/order hold reason system hold reason Order ship to order status On-hold quantity
Credit check: ship-to/sold-to customer zip code fraud	Order Ship To Order Header SKU	Order ship to order status Order header/order hold reason system hold reason On-hold quantity
Credit check: ship-to customer fraud	Order Ship To Order Header SKU	Order ship to order status Order header/order hold reason system hold reason On-hold quantity
Credit check: ship-to customer zip code fraud	Order Ship To Order Header SKU	Order ship to order status Order header/order hold reason system hold reason On-hold quantity
Credit check: ship to mismatch hold Evaluated only if the order contains a Credit Card pay category payment method, there is an order ship to or recipient address on the order, and:	Order Header Order Ship To Ship Via	Order ship to order status Order header/order hold reason system hold reason On-hold quantity Ship via priority
- the order total is greater than the Maximum Order Amount for Fraud Checking (D24), and - the ship via priority for the ship via on the order header matches the Ship Via Priority for Ship To Mismatch (L71), and - the number of times shipped to the address is less than the # of Times Shipped to Same Address (D25) OR the number of days since the last shipment to the address is less than the # of Days Since Last Order (D26).		
Credit check: email address fraud	Order Header Order Ship To SKU	OHR Hold reason OHD OHR Sys hold reason SKU On hold qty
Credit check: gift card hold Evaluated only if the Use Gift Card Fraud Checking (L72) system control value is selected.	Order Payment Method Order Detail Item Order Header	Pay type Order header hold reason ITM Number ITM SVC Type Order header/order hold reason system hold reason
Credit check: dollar hold	Order Header SKU	Order header/order hold reason system hold reason On-hold quantity

Process	Table	Field
Credit check: time hold	Pay Type Order Header SKU	Order header hold reason Order header/order hold reason system hold reason On-hold quantity
Credit check: check fraud	Pay Type Order Header SKU	Order header hold reason Order header/order hold reason system hold reason On-hold quantity
Credit check: check interface hold	Pay Type Order Header	Order header hold reason Order header/order hold reason system hold reason
Credit check: balance due exceeds the \$ amount	Order Header SKU	Order header/order hold reason system hold reason On hold qty
Credit check: pay types	Order Header SKU	Order header/order hold reason system hold reason On-hold quantity
Credit check: credit card fraud	Pay Type Order Header SKU	Order header hold reason Order header/order hold reason system hold reason On-hold quantity
Credit check: credit card authorization pending status	Pay Type Order Header SKU	Order header hold reason Order header/order hold reason system hold reason On-hold quantity
Credit check: outstanding balance due	Pay Type Order Header SKU	Order header hold reason Order header/order hold reason system hold reason On hold quantity
Evaluate order for refunds; create refund records for overpayments or balances due	Refunds	All fields

Process	Table	Field
Update the Flash Report	Order Control Summary	Dollars of orders entered to-date Orders entered to-date Orders entered month-to-date Dollars of orders entered month-to-date Orders entered year-to-date Dollars of orders entered year-to-date Orders open, reserved Dollars of orders open, reserved Orders held, reserved Dollars of orders held, reserved Total orders reserved/unprinted
Update order header and order ship-to status to match status of detail lines if all lines canceled.	Order Header Order Ship To	Order header order status Order ship to order status
Creates brokered backorder request for each order line that is eligible, and submits request to Order Orchestration. See Order Orchestration Integration for an overview.	Order Orchestration	All fields
Creates store fulfillment trigger record and supporting tables if any order lines are flagged for store fulfillment	Store Pickup Header Store Ship To Store Pickup Payment Store Pickup Detail Store Pickup Detail Message IL Outbound Trigger	All fields
 Note: Not currently implemented.		
Captures order disposition activity if the Capture Order/Call Disposition (K03) system control value is set to ALL; see Tracking Order/Call Disposition Activity	Order Disposition	Company Order # Order ship to # Universal call ID (if the order is associated with a call from an external order call center) source code entered by user create date create time

Process	Table	Field
Performs pick slip preparation	Pick Control Header Pick Control Detail Pick Control Label Pick Stored Value Card Reserved Order Line	See Applying Pick Slip Preparation to an Order for the updates that occur.
Sends balance of updates to background processing job (O/P ASYNC)		
Approved online credit card authorization: Create an online authorization record, authorization history record, and void authorization record if you performed online credit card authorization for a credit card payment method on the order	Online Authorization Authorization History Void Authorization	Online Authorization: company order # seq # auth amount vendor response 1 (auth response) vendor response 2 (card security response) auth # auth date status: *UPDT trans seq # card number terminal # AVS result Card security value ASV auth service Authorization History: All fields except Amount Deposited Void Authorization: All fields
Declined online credit card authorization: Create an online authorization record and authorization history record if you performed online credit card authorization for a credit card payment method on the order	Online Authorization Authorization History	Online Authorization: company order # seq # auth amount vendor response status: *SENT trans seq # card number terminal # ASV auth service Authorization History: All fields except Amount Deposited, Auth Date, and Auth #

Process	Table	Field
Undefined online credit card authorization response: Create an online authorization record and authorization history record if you performed online credit card authorization for a credit card payment method on the order	Online Authorization Authorization History	Online Authorization: company order # seq # auth amount vendor response auth # auth date status: *UPDT trans seq # card number terminal # ASV auth service Authorization History: All fields except Amount Deposited
Online credit card authorization communication failure: Create an online authorization record and authorization history record if you performed online credit card authorization for a credit card payment method on the order	Online Authorization Authorization History	Online Authorization: company order # seq # auth amount auth # auth date status: *UPDT trans seq # card number terminal # ASV auth service Authorization History: All fields except Amount Deposited, Auth Date, Auth #, and Vendor Response

Updates During Background Processing

The system performs the balance of the field and table updates during a background processing job (Order ASYNC) that runs after you accept the order. The ORDR_ASYNC job updates system tables with order and demand information as orders are entered and maintained. As you enter or maintain orders, the system sends the records to the Order Processing data queue for processing. As soon as the Order Processing Data queue receives a record to process, the record is processed immediately, regardless of the status of the Order Processing ASYNC (ORDR_ASYNC) job. The ORDR_ASYNC job processes multiple orders simultaneously. While the Order Async job does not need to be active to process records, you should set the Order Async job to active to handle reorganization and cleanup of any transactions that did not process correctly. See [Updates During Background Processing](#) for a detailed listing.

Tax-inclusive pricing: Each of the updates made for an item sold at the tax-inclusive price (in which VAT is added to the [Hidden tax](#) field on the order detail line, rather than accumulating tax in the *Tax* bucket on the order) are made using the tax-inclusive price minus the hidden tax.

For example, if you sell an item at a tax-inclusive price of \$10.00, but hidden tax of \$1.50 was included on the order detail line, each of the dollar updates will be in the amount of \$8.50.

Working with Items on the Order

Purpose: This topic discusses the options available on the [Work with Order Lines Screen \(Adding Items to the Order\)](#) to work with items you have added to the order by changing, reviewing or enhancing item information.

Use the item detail options in the center of the item entry screen to:

- Change information for an item on the order
- Review additional information for an item, such as:
 - Pending deliveries of the item on purchase orders
 - Availability in shippable warehouses
 - Special item pricing promotions
 - Customer Service notices
 - Specials
 - Relationships to other items you sell
 - Hidden tax
 - Gross profit margin and gross profit margin percent
- Attach information to a specific item, for:
 - Special handling instructions
 - Messages
- Review coordinating items and add them to the order

In this topic:

- [Work with Order Line Screen \(Changing/Adding an Item\)](#)
- [Display Open Purchase Orders Screen](#)
- [Item Availability Screen](#)
- [Display Quantity Pricing Window](#)
- [Work with Special Handling Screen](#)
- [Work with Custom Special Handling Screen](#)
- [Display Coordinate Items Window](#)
- [Select Coordinate Items Window](#)
- [Work with Order Line Messages Screen](#)
- [Select Item Relationships Window](#)
- [Display Item Relationship Screen](#)

Work with Order Lines Screen Options

Screen Option	Procedure
Change any information for an item or add an item, perform overrides at the item detail line level, review how the system priced the item, and review the quantity and date the inventory was reserved by the system	Select Change for the item or select Add Line on the Work with Order Lines Screen (Adding Items to the Order) to advance to the Work with Order Line Screen (Changing/Adding an Item). NOTE: Selecting Change for a set component item is controlled by the Set Component Maintenance (J01) secured feature. If you do not have the required authority, an error message indicates: Not authorized to change, delete, cancel, or sell out a set component.
Remove the item from the order	Select Delete for the item to delete the item. The system does not issue a warning message before deleting the item from the Order Entry screen. Also, the remaining items are renumbered in place of the deleted item. NOTE: - Selecting Delete for a set component item is controlled by the Set Component Maintenance (J01) secured feature. If you do not have the required authority, an error message indicates: Not authorized to change, delete, cancel, or sell out a set component. - Make sure that you are deleting the correct item when you use this option. The system deletes the item immediately from the order without prompting you to confirm the deletion.
Review the pending deliveries of this item on purchase orders	Select POs for an item to advance to the Display Open Purchase Orders Screen .
Review the availability of the item across all shippable warehouses	Select Availability for an item to advance to the Item Availability Screen .
Review the quantity break prices for the item offer	Select Pricing for an item to advance to the Display Quantity Pricing Window .
Enter or change the special handling instructions for an item that will be personalized	Select Special Handling for the item to advance to the Work with Special Handling Screen or the Work with Custom Special Handling Screen. NOTE: This option is not available if the additional charge code used for the special handling format is suppressed; see Special Handling Overview for a discussion.
Place an item on hold	Select Hold for the item to place the item on hold. Only open lines are eligible to be held. The item is not eligible for pick slip preparation until you release the line; if you generate a pick slip for the other items on the order, the pick slip lists this item as backordered. You can also put order lines in held status automatically through a special handling format. See Putting a Line on Hold through a Special Handling Format for a discussion.
Release a held item	Select Release for an item to release it from hold. Only held items (status = H) are eligible to be released. The line status changes to open (blank) and the item is now eligible for pick slip preparation. If the hold status was applied automatically through a special handling format, you can release the line by removing the special handling. See Putting a Line on Hold through a Special Handling Format for a discussion.

Screen Option	Procedure
Display coordinating items you can add to the order	Select Coordinates for the item to advance to the Display Coordinate Items Window .
Search for the item across warehouses and stores in external systems	Select Merchandise Locator for an item to advance to the Merchandise Locator Search Window (Searching for an Item) . See Merchandise Locator Process Overview for more information.
 Note: You cannot perform a merchandise locator search for an item/SKU if: • the Use Merchandise Locator (I38) system control value is unselected. Otherwise, an error message indicates: Merchandise Locator is not enabled. • you have already entered an <i>Ord qty</i> to add to the order. See the Display Selected Items Window for a workaround. • the item is: – soldout, canceled or closed – included on a printed pick slip (however, if the pick slips have been voided, you can use the merchandise locator option) – a component of a set – a membership item – a subscription item	
Enter a message about the item	Select Messages for the item to display the Work with Order Line Messages Screen .
Review other items that are compatible with this item	Select Relationships to display the Select Item Relationships Window .
Sell out a backordered item	Select Sell Out to change the order line status to soldout and recalculate tax.

 Note:

Selecting Sell Out for a set component item is controlled by the Set Component Maintenance (J01) secured feature. If you do not have the required authority, an error message indicates: Not authorized to change, delete, cancel, or sell out a set component.

Work with Order Line Screen (Changing/Adding an Item)

Purpose: Use this screen to override order defaults or review reservation information for an item.

How to display this screen:

- Select Change for an item at the [Work with Order Lines Screen \(Adding Items to the Order\)](#)
- Select Create at the [Work with Order Lines Screen \(Adding Items to the Order\)](#)

Note:

- The [Item](#) and [SKU](#) fields are blank if you selected Create.
- Selecting Change for a set component item is controlled by the Set Component Maintenance (J01) secured feature. If you do not have the required authority, an error message indicates: Not authorized to change, delete, cancel, or sell out a set component.
- See [Adding Different Types of Items to the Order](#) for more information on the processing the system performs for different types of items.

Field	Description
Order#	A unique number assigned by the system to identify an order. <i>Numeric, 8 positions; display-only, assigned by the system.</i>
Ship To #	Unlabeled field to the right of the order number. The number assigned to the shipping address on the current order. The system assigns a sequential ship-to number to every order, even if the shipping address and the sold-to address are the same. The first ship-to address is assigned the number 1. <i>Numeric, 3 positions; display-only, assigned by the system.</i>
Ln# (Line number)	The number assigned to this item on the order. <i>Numeric, 3 positions; display-only.</i>
Sts (Status)	The current status of the item detail line. The status field is Open or Soldout during Order Entry: Open Status An item is assigned an open status when it is added to an order and it is currently “active” in your inventory. If a partial quantity of the item is sold out on the order line, the order line status is still open. The order line and order totals reflect the line quantity that is reserved or backordered, but do not reflect the soldout quantity. Other Statuses There are several other item detail line status codes that are assigned by the system at other points during the life of an order detail line, including: • Soldout • Canceled • Closed (item was shipped to customer) • Error (the item ordered through a phone service included data errors that you must correct) • Express bill (no pick slip produced for item, because item already removed from inventory; order moves directly to billing status). <i>Alphanumeric, 9 positions; display-only, assigned by the system.</i>

Field	Description
B/O (Backorder reason)	The reason why this item was backordered, as determined by the system. Valid values are: • Future order • Item not in warehouse • No warehouse specified • Not enough (inventory) available in warehouse • Reservation bypassed; if the Use OROB for Fulfillment Assignment (M31) system control value is selected, the system uses this reason for each item sent to Order Administration for fulfillment assignment; see Brokered Backorders. • SKU reserve limit exceeded The system assigns a backorder status to items that could not be fulfilled (no on-hand inventory available for the item). NOTE: Not displayed if the item was available and could be reserved. <i>Display-only, updated by the system.</i>
Ofr (Offer code)	A code for the catalog, space or television advertisement from which you accept orders. The offer defined for the order controls how shipping is calculated and items are priced. However, if you override the offer for an item (if the customer is ordering from more than 1 catalog, for example), demand for the item will be attributed to the offer associated with the item rather than the order. Demand represents the number and dollar value of orders placed against an offer. Related System Control Values • The system automatically overrides the offer for an item if Override Offer on Order Detail Line (D49) system control value is selected and the item is not sold in the offer used on the order. • The system automatically overrides the offer for an item if the Override Offer/Page/Alias on Order Detail (E72) system control value is selected and the item does not contain a page/alias in the offer used on the order. • The cursor positions to the offer field, which is blank, if the Position Cursor on Offer Field in OE/OM (F91) field is selected. <i>Alphanumeric, 3 positions; required.</i>
Item	The code for a unit of inventory. Items are defined in and validated against the Item table.
	 Note: An item alias is displayed if the customer ordered using an alias and the Display Item Alias (D56) field in the System Control table is selected.
SKU	<i>Alphanumeric, 12 positions; display-only.</i> A code that identifies the style of the item, such as its color or size. <i>Alphanumeric, three 4-position fields; display-only.</i>

Field	Description
Qty (Quantity ordered)	The number of units of this item being ordered, excluding any units sold out. You can change the quantity ordered, but you cannot change a positive to a negative or vice versa or a message indicates: Order qty may not be changed between (+) / (-). Instead, you must delete and reenter the item. If you change the quantity of a set item, the change is also reflected in the component items. The Maximum Order Quantity (C60) field in the System Control value controls the maximum value you can enter in the <i>Quantity</i> field; additionally, the Allow Maximum Order Quantity Override (A70) secured feature controls whether individual users can exceed this maximum. <i>Numeric, 5 positions; required.</i>

Field	Description
Price	The actual selling price of a single unit of the item, either calculated by the system or entered on the line as a price override. Secured Feature The Price Overrides (A23) secured feature controls whether you can update the price for the order line; if you do not have authority to this secured feature, the <i>Price</i> field is display-only. Price Overrides If you enter a price override, you must also enter a price override reason code in the Ovr (Price override reason code) field. You can define a maximum percentage operators can discount an item by entering a percentage in the Price Override Limit Percent (E55) system control value. The system uses the price from the item/offer to determine whether the price override exceeds the percentage. The override limit applies only to prices that are lower than the item/offer price. This is helpful in reducing the possibility of fraud by order entry operators. Price Override Example The system uses this calculation to determine the percentage of the price override: $(\text{offer price} - \text{price override entered}) / \text{offer price} * 100 = \text{price override percentage}$ Example: $\begin{aligned} \text{price override percentage} &= 10\% \\ \text{offer price} &= \$40.00 \\ \text{price override} &= \$35.00 \\ (40.00 - 35.00) &= 5.00 \\ 5.00 / 40.00 &= .125 \\ .125 * 100 &= 12.50 \text{ (12.50 exceeds the 10\% price override)} \end{aligned}$ A message indicates if an operator enters a price that is less than the percentage allowed: Entered price exceeds override limit. The Override Price Override Limit (A64) secured feature controls whether operators can override the Price Override Limit Percent (E55) Override Price Table Maximum You can use the Price Table Level Override Code (E05) to apply the best possible price table pricing to an order line, even if it is beyond the maximum specified in the price table; however, to apply this pricing, you need to: 1. Enter the requested quantity of the item at the Work with Order Lines Screen (Adding Items to the Order) using the default pricing 2. Select Change for the item to advance to the Work with Order Line Screen (Changing/Adding an Item) 3. Complete this screen by entering the Price Table Level Override Code (E05), but no price for the item When you select Reprice or Accept, the system applies the best possible price table pricing. See Working with Price Tables (WPTB)

Field	Description
	and the Price Table Level Override Code (E05) system control value for more information. Manual Price Override Code You cannot use the Price Table Level Override Code (E05), Price Override Reason for Price Matrix Customer Specials (K42), or Price Override Reason for Promotions (K45) as a regular price override reason code when you manually enter a price override. Negative Prices The Allow Negative Prices in Order Entry (E97) system control value controls whether you can enter a negative item price. If you enter a positive item quantity, a negative price produces a credit; with a negative quantity, a negative price produces an invoice. Maximum Value The Maximum Order Line Value (E98) field in the System Control value controls the maximum dollar value of a line you can enter; additionally, the Allow Maximum Order Line Value Override (A69) secured feature controls whether individual users can exceed this maximum. <i>Numeric, 13 positions with a 2-place decimal; required, calculated by the system.</i>
N/C (“No charge” flag)	Controls whether to charge the customer for the item. Valid values are: • Selected =Item is given to the customer at no charge. • Unselected =The customer pays for the item. If you select this field, the order totals are not increased, no charge prints for the item on the pick slip, and the customer will not be invoiced for the item. Also, you must enter a price override reason code in the Ovr (Price override reason code) field. The Price Overrides (A23) secured feature controls whether you can update the no charge flag for the order line; if you do not have authority to this secured feature, the <i>No charge</i> field is display-only.

Field	Description
Ovr (Price override reason code)	A code that represents the reason for overriding the item price or giving the item at no charge. Price override reason codes are defined in and validated against the Price Override Reason table. See Establishing Price Override Reason Codes (WPOR). Secured Feature The Price Overrides (A23) secured feature controls whether you can override the item price; if you do not have authority to this secured feature, the <i>Price override reason code</i> field is display-only. Price Table Pricing If you use price table pricing, you can define a Price Table Level Override Code (E05). Use this code to override the maximum price break you have defined for an item in the price table. Customer Price Group Price Override Reason Code If you assign the price override reason code defined in the Price Override Reason Code for CPG Pricing (L59) system control value, the order line cannot be further discounted except by order-level coupons. VAT If you make any changes to the order that will result in changing whether the order is subject to VAT, the system will reprice each item accordingly and recalculate tax as well. However, this update does not take place for any line with a price override, whether the override was made by a user or by the system (for instance, for a price table premium). You must delete the line and reenter it to correct the price and tax information. Quantity Price Matrix Customer Special If the order line is priced using a Quantity Price Matrix Customer Special, the system assigns the Price Override Reason for Price Matrix Customer Specials (K42) to the order line during repricing. When this price override reason code is defined for an order line, the system cannot apply any additional discounts, such as promotions, to the order line. However, the system can still apply a source % discount to the order line. In addition, the system prevents you from manually entering this price override reason code on an order line: Price override reason reserved and cannot be manually entered. See Order Repricing, Premiums, Discounts, and Promotions for more information about repricing and Working with Quantity Price Matrix (WQPM) for an overview on quantity price matrix pricing. Warranty Item If the Default Price Override Reason for Warranty Items (G01) system control value contains a price override code, the system defaults this price override code to this field when an operator enters a warranty item. Item Category or BOGO Promotion If the order line is discounted through an Item Category or BOGO (Buy One/Get One) promotion, or priced at “no charge” through a BOGO promotion, the system uses the Price Override Reason for Promotions (K45). This system control value prevents further discounting from applying to the order line. If this system control value is blank, the system uses the Default Price Override Reason (B35) for the “no charge” lines; however, the other lines discounted

Field	Description
	through these promotions will be subject to further discounting. See Working with Promotions (WPRO) for more information. You cannot manually enter the Price Override Reason for Promotions (K45) on an order detail line. <i>Alphanumeric, 1 position; required if overriding a price or selling item at no charge.</i>
Cpn (Coupon)	Indicates whether a coupon is being redeemed for this item. • Selected = The customer is using a coupon for this item. • Unselected (default) = The customer is not using a coupon towards the purchase of this item. You can enter a coupon for an item during Order Entry, for example, if you include a coupon in your catalog that the customer can use towards a purchase. If you select this field, you must also enter the amount of the coupon in the <i>Coupon amt</i> field. The dollar amount of the coupon will be subtracted from the price of the item and *Coupon Item Price will display on this screen as the pricing method.
	 Note: For a coupon to be applied to an item, the Pricing Values (B31) in the System Control table must use the COUPON/ITEM pricing method (or it should be near the top of the pricing hierarchy) or you should use Best Way Pricing (A78) so that the system can give the item to the customer at the lowest available price.
Coupon amt (Coupon amount)	The value of the coupon being applied against this item. The system subtracts this amount from the item's price. You must select the <i>Cpn</i> (Coupon) field if applying a coupon against an item. <i>Numeric, 13 positions with a 2-place decimal; required if using a coupon.</i>
Description (Unlabeled field below Item field)	The description of the item. <i>Alphanumeric, 25 positions; display-only.</i>

Field	Description
Pricing method	The method used to calculate the price for the item, controlled by: • The pricing hierarchy defined in the Pricing Values (B31) system control value. • The pricing method associated with the source code used on the order or entered for the item. • A price override on the item. Pricing Methods • 1 Coupon item price • 2 Customer discount% • 3 Contract price • 4 Special source price • 5 Column price • 6 Quantity break price • 7 Offer price • A Repriced-prorated discount • B Quantity Price Matrix Customer Override • C Use item cost • E Price code • F Customer Price Group • G BOGO • I Repriced-qty break/item • J Repriced Customer Price Group Best Price • K Price table default • L Price Table Level Ovr • N No charge (with cost tracking; source code definition) • O No charge/no cost (source code definition) • R Price override (includes entering as no charge in Order Entry) • T Price table premium • U Upsell Item • V Repriced-volume discount • Y Price table • X Qty Price Matrix • Z Repriced-item category promotion <i>Alphanumeric, 25 positions; display-only, updated by the system.</i>
Offer price	The price of the item in the catalog, before applying any additional discounts or repricing. If the order was subject to VAT and tax-inclusive pricing, in which any tax is included in the <i>Hidden tax</i> field rather than the <i>Tax</i> bucket on the order, the offer price presented here is the tax-inclusive offer price. The Price Overrides (A23) secured feature controls whether you can update the offer price for the order line; if you do not have authority to this secured feature, the <i>Offer price</i> field is display-only. <i>Numeric, 13 positions with a 2-place decimal; display-only.</i>

Field	Description
Pre-disc. price (Pre-discount price)	The item price before applying any coupons or dollar discounts by source or offer, if the Prorate Dollar Discounts and Coupons (D90) field in the System Control table is selected, but after applying other discounts and repricing. The system does not update this field if you change the customer's tax status at any point after entering the item. If you use tax-inclusive pricing, there may be cases where the system reprices items due to changes in a customer's tax exemption status, changing the shipping address to a VAT-exempt state, etc. In these cases, the pre-discount price may not correspond to the way the way the actual price was derived. <i>Numeric, 13 positions with a 2-place decimal; display-only.</i>
Duty	The amount of duty on the item. Duty is a tax based on the item and the country where you are shipping the item. On other screens in Order Entry and Maintenance, the duty is generally included with the special handling total on the order. The system determines whether to add duty by comparing the item's harmonize code with the harmonize code defined for the country's duty rates. The system calculates duty, if it finds a match, based on the percentage or per-unit amount defined for the duty rate. See Setting Up the Country Table (WCTY) for a complete discussion of defining and using duty charges for a country. When the system adds duty to the order for an item, it also writes an order line message. <i>Numeric, 13 positions with a 2-place decimal; display-only.</i>

Field	Description
Ship via	The shipper that will deliver <i>this item</i> to the customer. Leave this field blank if you want to use the shipper defined on the order header. Enter a different ship via code here only if you want to ship this particular item by another shipper. Ship via codes are defined in and validated against the Ship Via table; see Working with Ship Via Codes (WVIA). Also, it is validated against the Zip/City/State (Postal Code) table; see Setting Up the Zip/City/State (Postal Code) Table (WZIP). If you enter a ship via code and the <i>Perform ship via edit?</i> flag for the country is selected, the system validates the SCF/ship via combination against the SCF Ship Via table when you complete the order; see Working with SCF/Ship Via Values (WSHV). Item Ship Via Overrides Item ship via overrides define the shippers eligible to ship the item to its destination. If ship via overrides exist in the Item Ship Via Override table for an item on the order, the system evaluates the ship via you define for the order line to determine if the ship via is eligible to ship the item. Additionally, if you prompt on the <i>Ship via</i> field, you advance to the Work with Item Ship Via Overrides screen containing only those ship vias eligible to ship the item. If the ship via you enter is not found in the Item Ship Via Override table for the item on the order, you advance to the Ship Via Overrides for Item Window, requesting you to select an eligible shipper to assign to the item on the order line. Additionally, if you do not define a ship via on the order line, the system evaluates the ship via on the order header to determine if it is eligible to ship the item. If item ship via overrides do not exist for the item, you can define any valid ship via code in this field. See Working with Item Ship Via Overrides for more information on defining eligible shippers for an item. Express Bill Ship Via You can change an item on an order to express bill by entering an express bill code. When you express bill an item, a pick slip does not print and no shipments occur for the item. An error message indicates if you change an item on an express order to ship non-express: Ship Via must be an Express Bill. <i>Numeric, 2 positions; optional.</i>
Extension	The actual selling price of the item multiplied by the quantity ordered, excluding any sold out units. <i>Numeric, 20 positions with a 2-place decimal; display-only, calculated by the system.</i>

Field	Description
Arrival date	The date when the customer wants to receive this item. The arrival date entered here overrides the arrival date defined for the order. The arrival date is initially set to the current date for each item; however, you can enter some future date on this screen to delay shipment of the item. The system defaults a future ship arrival date to an item with a future ship status if the item's status code matches the Future Orders Item Status (E52). The future arrival date that defaults for this item comes from the Default Future Orders Arrival Date (E53).

 Note:

The system does not prevent you from setting the arrival date for the order line to be earlier than the current date or the order date.

The arrival date controls:

- Whether the item is reserved
- Whether to create a pre-generated pick for the item; see [Selecting Order Lines for Pick Slip Preparation](#).

Influence on Reservation

The arrival date for the item controls whether to reserve inventory as follows:

Arrival date - [Reservation Lead Days \(B27\)](#) = Date

The system does not reserve inventory if the result is a future date. In this case, the item is flagged as a future order and assigned a backorder status.

When you run the Evaluate Future Orders process (typically, every evening) it evaluates each item flagged as a future order and reruns the arrival date calculation. When the result is no longer in the future, the process reserves the inventory. See [Scheduling Jobs](#) for more information.

Influence on Pick Slip Preparation

The item's arrival date also controls whether the system creates a pre-generated pick for the item.

The system uses this calculation:

Arrival Date from Order Line (or Order Ship To) - (Pick Processing Days (B37) + Ship Via Lead Days in WSHV) < or = Today's Date

The system creates a pre-generated pick for the order line if this system-calculated date is less than or equal to today's date; otherwise, the system does not create a pre-generated pick for the order line until the date is within the allotted time frame. See [Selecting Order Lines for Pick Slip Preparation](#).

Zone reservation rules: For items subject to zone reservation, this date is:

- the zone start date if the item was ordered prior to the zone season start date.
- the order date if the item was ordered between the zone season start date and zone end date, provided that:

Field	Description
	– if you use Standard Zone Reservation Rules, the item was available or you took the order before the zone's deferred cutoff date – if you use Alternate Zone Reservation Rules, the item was available or had an open PO quantity • otherwise, this date is the next season's zone start date from the zone reservation dates. See Shipping Zone Reservation Overview for a complete discussion. You can use the order ship to's <i>Arrival date</i> as a selection criterion in pick slip generation; the system does not look at the order line arrival date during pick slip generation. See Streamlined Pick Slip Generation (WSPS). <i>Numeric, 6 positions (in user date format); required.</i>

Field	Description
Source	A code used to identify a segment of your customer base or a rented list to whom you mail a catalog. The source code prints on the catalog mailing labels next to the customer's name. A source code entered here overrides the source code entered on the order header screen. The source code on the order header determines shipping and item pricing; the source code on the order detail line is used to track demand. Prompting for a source code Click on the arrow at this field to obtain a list of current source codes. Only the source codes whose Display on O/E (Display in Order Entry) fields are selected appear. Restricted source codes During Order Entry, you must use only unrestricted source codes (Restricted = Unselected in the Source Code table). A source code may be identified as “restricted” when: • The source code is obsolete; no new orders can use this source code. • The source code includes errors • The source code was created by mistake. Initially, all new source codes are unrestricted. When Initializing an Offer (MOFI), however, you can restrict all source codes associated with a particular offer until the offer is in effect. Capturing the Source Code The system writes the source code used by a new customer to the Original source code field in the Customer record. If the Update Original Source Code for Recipient Customers (F90) system control value is selected, the system writes the source code defined for the sold to customer to the <i>Original source</i> field for a recipient customer. The system also writes the source code to the Current source code field in the Customer record for new and existing customers. The system updates this field each time the customer places a new order from a different source code. Capturing Demand If you override the source code for an item, the system updates demand for the new source code for this order line. Demand represents the dollar amount and number of orders. A source code may default to this field automatically, depending on how you have set the Load Source from Mailing History (D20) and Use Source Code from Order Header When Creating Order Lines (D73) system control values. The system defaults the source code defined for the offer on the order detail line if the offer on the detail line is not associated with the source code defined on the order header and the Default Offer Source Code to Order Detail Line (G28) system control value is selected. Source codes are defined in and validated against the Source Code table. See Working with Source Codes (WSRC). <i>Alphanumeric, 9 positions; required.</i>

Field	Description
Exp ship date (Expected shipment date)	The date when you expect receipt of a purchase order that can be used to fulfill this order. This date takes into account P.O. layering, in which items already backordered are filled first. This means that the date displayed here might not be when the next purchase order is due. The system updates this field using information from Purchase Order Receipts and the Evaluate Backorders programs. No date is indicated here if the item has been reserved or if there are no outstanding purchase orders for this item. The expected shipment date is cleared once the purchase order is received through Purchase Order Receiving. Drop ships: This date is included for drop ship items only if the Assign Drop Ship Expected Ship Date (I59) system control value is selected. See that system control value for more information. <i>Numeric, 6 positions (in user date format); display-only, updated by the system.</i>
C/G (Coordinate group code)	A number that you can enter to force two or more items to ship together. The system does not create a pre-generated pick for these items until they are all available; see Selecting Order Lines for Pick Slip Preparation. You must use the same ship via for all items assigned to the same coordinate group. <i>Numeric, 3 positions; optional.</i>

Field	Description
Freight	The shipping charge for this item. You can enter a freight override only if the current source code uses one of these line-level freight methods: • Flat rate by item (Flat Rt/Item) freight • Flat rate by quantity (Flat Rt/Qty) freight • Flat rate by item source (Flat Rt/Itm Src) freight • Item (By Item) freight • Weight freight This freight charge overrides the system- calculated freight charge for this item. Freight Method Validation If you enter a freight override here, the system checks the freight method for the Source and displays a message if you are not using a line-level freight method: Freight charge (xx.xx) cannot be overridden - order level freight method. In response to this message, you must remove the freight override or change the source code on the order to one that uses a line-level freight method. Source Code Override at Line Level If you override the source code at the item level, make sure you update the offer code appropriately. Demand (the number and dollar amount of orders for this item) will be attributed to the source code/offer at the item level, if you perform an override. This source code override is used only for historical updates and has no effect on how freight and prices are calculated. Freight Exempt Items The system checks the Working with Freight Exempt Items (WFEI) menu option for freight exempt items when the Use Item Freight Exemption File (E73) system control value is selected. See Freight Exempt Items Setup for additional information. <i>Numeric, 13 positions with a 2-place decimal; optional.</i>
G/W (Gift wrap flag)	Indicates whether this item will be gift wrapped. Valid values are: • Selected = Gift wrap item • Unselected (default) = Do not gift wrap item The Gift wrap field in the Item/Offer record determines whether the item is eligible for gift wrapping. If so, the G/W price (Gift wrap price) field includes the charge for gift wrapping, if any. Items marked for gift wrapping are identified on the pick slip with the literal Gift Wrap, along with the gift wrapping charge.

Field	Description
S/H code (Special handling code)	A code that represents some type of work that will be performed on the item, such as monogramming, alterations, engraving, etc. A value defaults here if a special handling code is specified for the item/SKU offer, or if you have already specified special handling for the item. You can mark the item for special handling only if the item is eligible for it (Special handling = selected in the Item/Offer or SKU/Offer table). If you click on the arrow here, only special handling codes are listed on the prompt screen. Special handling codes are defined in and validated against the Additional Charges table. See Establishing Additional Charge Codes (WADC). The special handling instructions screen opens if the item is marked for special handling. At this screen, you can enter notes about how to work on the item. Also, you can enter or override a charge for this work. See Work with Special Handling Screen or the Work with Custom Special Handling Screen.

 Note:

You do not advance to a special handling screen if the special handling code is flagged to suppress the display of the screen, based on the setting of the [Suppress S/H window](#) field; however, any related handling charges will be added to the order.

The special handling instructions and special handling charge may print on the pick slip, depending on which pick slip print program you use.

Special handling validation

If you enter a special handling code, the system verifies that special handling has been defined for the item in the item/offer or SKU/offer and displays a message if special handling has not been defined: Special handling is not valid for this item in this offer.

Alphanumeric, 2 positions; optional.

Field	Description
S/H charge	The charge to perform extra work on the item, such as alterations, engraving, or monogramming. A charge defaults here if the item is set up for special handling in the item offer or SKU offer, and if a price has been defined for it. You can specify a price for special handling at: - the item offer or SKU offer (standard or custom special handling) - the special handling format (custom special handling only) If a price is specified at both the item/SKU offer and the special handling format, the price specified for the offer is used. You can also enter a handling price here if you have the required authority. See the Enter or Override Personalization Charge (A40) and Enter or Override S/H Price (B12) secured features, or see Special Handling Overview for a general discussion. This charge is added to the <i>Handling</i> total on the order. <i>Numeric, 13 positions with a 2-place decimal; optional or display-only.</i>
Future order	Indicates whether the system will reserve inventory for this item, based on the arrival date entered for the item. No items are reserved for “future orders” until a later date. Valid values are: - Selected = Item is a “future order” and inventory will not be reserved. - Unselected = Item is a “current order” and inventory will be reserved. Identifying Future Orders The system subtracts the Reservation Lead Days (B27) from the arrival date entered on the order or for an item. If this date is greater than today's date, the system will not reserve inventory for the order or item, because it is too soon. Reserving for Current Orders The Evaluate Future Orders program runs daily to determine whether future orders are eligible for reservation, based on the arrival date calculation. If so, the item detail line is identified as a “current order” and inventory will be reserved. See the Arrival date field for more information about how the arrival date controls reservation and creating pre-generated picks. The system updates the <i>Future order</i> field automatically.

Field	Description
Warehouse	The warehouse used to ship this item. The warehouse you enter in this field overrides: - the warehouse from the order header - the warehouse from a warehouse list; see Working with Warehouse Lists (WWHL). - the warehouse defined for the item in the Item table If the Reserve from Non-Allocatable Warehouse (J25) system control value is blank, the warehouse you enter must be an allocatable warehouse (the <i>Allocatable flag</i> for the warehouse is selected). Warehouse codes are defined in and validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS). Updating the Warehouse for an Order Line If you update the warehouse defined for an order line, the system: - Removes any existing inventory reservations for the order line. - Attempts to reserve the item on the order line in the new warehouse specified. If the item is not available in the warehouse specified, the system assigns this warehouse as the backorder warehouse for the unreserved quantity of the item on the order line. Example: You add item A123 to an order for a quantity of 3 and it reserves against warehouse 1. You change the warehouse for the order line from warehouse 1 to warehouse 2. The system unreserves the quantity of 3 from warehouse 1 and reserves the quantity against warehouse 2. However, warehouse 2 can only reserve 2 units of the item; the remaining 1 unit is backordered against warehouse 2. Reserving Against a Non-Allocatable Warehouse If the Reserve from Non-Allocatable Warehouse (J25) system control value is selected, the system allows you to reserve inventory against a non-allocatable warehouse. You can define a non-allocatable warehouse in the <i>Retail warehouse</i> field for the order type; any orders entered for this order type will default the non-allocatable warehouse to the <i>Warehouse</i> field on the order/order line to reserve against the non-allocatable warehouse. If the item is not in stock, the system will backorder the item against the non-allocatable warehouse.

 Note:

The *Reserve warehouse* defined for the shipping address on the order takes precedence over the non-allocatable warehouse defined for the order type on the order; see [Order Header Warehouse Default Hierarchy](#).

Soldout Processing for Non-Allocatable Warehouse

If the isregard Soldout Controls for Non-Allocatable Warehouses (J27) system control value is selected, the system evaluates the warehouse assigned to the order line, if any.

Field	Description
	- If the warehouse assigned to the order line is a non-allocatable warehouse, the system reserves the item against the non-allocatable warehouse, regardless of the soldout control code defined for the item. If the item cannot be reserved, the system backorders the item in the non-allocatable warehouse. - If the warehouse assigned to the order line is an allocatable warehouse, or the <i>Warehouse</i> field for the order line is blank, the system follows regular soldout control rules to determine whether to sell out the item. See Working with Soldout Controls (WSLD) for more information on how the system determines when to sell out an item. <i>Numeric, 3 positions; optional.</i>
Cancel date	The date the customer wants to cancel this item if it has not been shipped. The system uses this calculation: Cancel date -Lead days (System Control table) -Transfer days (Warehouse/Drop Point table) -Lead days (SCF/Ship Via table) Date to stop reserving stock Any items that have not shipped before this date are included on the Order Cancellation List along with the customer's name and telephone number. Customer Service uses this report to contact each customer to see if they still want the item; otherwise, the item should be canceled. <i>Numeric, 6 positions (in user date format) optional.</i>
Affect inv (Affect inventory?)	Indicates whether the quantity available to sell (on-hand quantity) of the item is reduced during order entry. Valid values are: - Selected (default for a regular item) = Inventory levels are affected during order entry and when you ship the order. During order entry, reserved and open inventory increase and available inventory is decreased; when you ship the order, on-hand inventory, pickable inventory, open inventory, reserved inventory and total inventory across all warehouses decreases. - Unselected (default for a Non/inv (Non inventory) item) = Inventory levels are not affected. The system creates a pre-generated pick for the non-inventory item, even if all other items on the order are not eligible for pick slip preparation; however, the system will not create a pre-generated pick for a non-inventory item if all other items on the order are backordered; when one or more backordered items are available, the system creates a pre-generated pick for the non-inventory item as well as for the available item(s). See Selecting Order Lines for Pick Slip Preparation. You cannot change the <i>Affect inventory</i> flag to N for a drop ship item: Affect Inventory flag must be Y for Drop Ship Items.

Field	Description
Drop ship	Indicates whether this item is a drop ship item, which is an item that you do not sell from your own inventory. Instead, drop ship items are ordered from and shipped from a vendor. About drop ship items: Drop ship items are not usually available for reservation. Instead, you generate drop ship pick slips or purchase orders for these items, and the vendor ships the items to your customers. The drop ship items bill when you receive notification of shipment from the vendor. Even if an item is flagged as Drop ship, the system reserves it if it is available in the warehouse. Overriding the setting: The setting defaults from the Drop ship field in the Item table. Optionally, when you enter a new item, you can override a regular item to a drop ship item by selecting the Drop Ship setting, or you can override a drop ship item to a reserve or backorder from the warehouse by selecting the Override D/S setting. No other selections update the order line. Valid values are: • Drop Ship = The Drop ship is selected for the item, indicating that the vendor ships the item. Optionally, select this setting for a non-drop ship item to prevent it from being reserved, backordered, or submitted to the Order Orchestration as a brokered backorder. • Reg. Item = The Drop ship is not selected for the item, indicating that you ship the item from the warehouse. • Override D/S = Optionally, select this setting for a drop ship item to have the item backordered in the warehouse. This option is available only for items flagged as Drop ship.

 Note:

This field is enterable only if you advance to the Work with Order Line screen by selecting Add Line on the [Work with Order Lines Screen \(Adding Items to the Order\)](#). When you advance to this screen for an existing order line, this field is display-only.

Optional or display-only.

Priority	Used by the Evaluate Backorders program to match items to backorders. A value defaults to this field if a priority was entered or defaulted into the Pty (Priority) on the order header; and this field, in turn, defaults from the B/O priority (Backorder priority) field for the source code. Immediate Reservation If you use Immediate Reservation, this value determines the sequence in which orders with backordered items receive inventory. The Evaluate Backorders program uses the priority to determine which backordered items receive stock first. See Reviewing Reservation Types. <i>Numeric, 1 position; optional.</i>

Field	Description
Bypass rsv (Bypass reservation)	Indicates whether to reserve this item during Order Entry if inventory is available. - If the Use OROB for Fulfillment Assignment (M31) system control value is selected, the system selects this flag for each order line sent to Order Orchestration for fulfillment assignment. See Brokered Backorders. - If the Use OROB for Fulfillment Assignment (M31) Use OROB for Fulfillment Assignment (M31) Interactive Reservation. See Working with Interactive Reservation (MIRV). You can define an item to bypass reservation in the Item table. Valid values are: - Unselected (default) = Do not bypass reservation. - Selected = Bypass reservation. This setting may default from the Item table if the item is set up to bypass reservation, because it is available in a limited quantity or it is a limited edition.
Page/letter	Indicates the page number and letter used to identify the item in the catalog, if using page/letter assignments in your catalogs instead of item numbers. Page/letter codes are defined for an item in the Item/Offer table. See Assigning Items/SKUs to Offers. <i>Alphanumeric, 6 positions; display-only.</i>
Cost override	An override to the base cost of the item, as defined in the SKU table. You can override the cost of an item when you place a special order from your vendor for the customer. The cost override ensures that your gross margin is accurate. <i>Numeric, 13 positions with a 4-place decimal; optional.</i>
G/W \$ (Gift wrap charge)	The cost to gift wrap the item, if any. May default from the G/W price (Gift wrap price) field in the Item/Offer table. A charge appears here only if the item is being gift wrapped (G/W = Selected). This is the per unit charge to gift wrap the item. This charge is multiplied by the quantity ordered. Added to the handling charge total on the order. <i>Numeric, 13 positions with a 2-place decimal; display-only, updated by the system.</i>
Add'l frt (Additional freight)	The additional charge to ship this item, if one was defined for the shipper. If, in the Ship Via table, the shipper is set up to use additional charges only, the charge entered here will be used. Otherwise, the additional charges will be added to the regular shipping charges, up to the maximum charge from the <i>\$Limit</i> for the Ship Via. For example, you may be charged an additional amount for overnight or express shipping. See Working with Ship Via Codes (WVIA). <i>Numeric, 13 positions with a 2-place decimal; display-only.</i>

Field	Description
Tax	Sales tax charged for the item, as calculated by the system. This is the extended tax amount; that is, the total tax for the entire quantity. The total in the <i>Tax</i> bucket on the order may not equal the totals for each item if, for example the order is subject to tax on handling and/or freight, or due to rounding up or down to the nearest penny. On orders subject to VAT and tax-inclusive pricing, any tax appears in the <i>Hidden tax</i> field. This amount is not included in the <i>Tax</i> bucket on the order totals. <i>Numeric, 13 positions with a 5-place decimal; display-only.</i>
Hidden tax	The amount of any hidden tax attributed to the item. Displayed only if the Tax Included in Price (E70) system control value is selected, and a hidden tax amount appears only for orders and items subject to VAT and tax-inclusive pricing. On orders using tax-inclusive pricing, you charge a different, higher price for an item than an orders subject to conventional tax. Also, any tax amount is not calculated in the standard way and included in the <i>Tax</i> bucket on the order; instead, a hidden tax amount is calculated based on the information you have defined for the customer's country or the item itself, and this amount is "hidden" on the order detail line; this tax is not visible to the customer. Unlike the item tax indicated in the <i>Tax</i> field, the hidden tax is a unit amount, not an extended amount; you must multiply the hidden tax amount by the item quantity to arrive at the extended hidden tax amount for the order line. In tracking sales figures, such as in the Order Billing History table and on marketing reports, the system subtracts the hidden tax amount from the item price to determine sales dollars. For example, if the customer pays \$10.00 for an item, but the hidden tax amount is \$1.50, the system posts the sale as \$8.50. It is possible for the hidden tax for an item to exceed the price you charge the customer if you have defined hidden tax for the item as an amount rather than a percentage of the item price. An item may be exempt from tax, hidden tax, or both based on exemptions defined for the order, customer, state, or item. See Working with Customer Tax Status for more information on tax exemptions. See Setting Up the Country Table (WCTY) for more information on how the system determines how to apply tax or hidden tax to an order. <i>Numeric, 13 positions with a 2-place decimal; display-only.</i>
G/M (Gross profit margin)	The amount of the item's price that exceeds the cost of the item. You can use gross margin to determine the profit of an item on an order based on the item's selling price, or to determine the profit of an entire order. See Determining Gross Profit for a discussion. The Display Gross Margin (A65) secured feature controls whether this field is indicated in order entry, maintenance, inquiry and item availability. <i>Numeric, 13 positions with a 2-place decimal; display-only.</i>

Field	Description
G/M% (Gross profit margin percentage)	The percentage of the item's price that exceeds the cost of the item. You can use gross margin to determine the profit of an item on the order based on the item's selling price, or to determine the profit of an entire order. See Determining Gross Profit for a discussion. The Display Gross Margin (A65) secured feature controls whether this field is indicated in order entry, maintenance, inquiry and item availability. <i>Numeric, 5 positions with a 2-place decimal; display-only.</i>

Field	Description
Quantity reserved	The number of units of the item reserved. The system may reserve inventory from a single warehouse or over multiple warehouses, depending on whether a warehouse is defined for the order and the values in the Ship Complete from 1 Warehouse (B16) and Split Line Over Multi Whse (B19) system control values. Using Immediate Reservation If using Immediate Reservation (A64), inventory is reserved on a first-come, first-served basis (FIFO) in the specified warehouse (at the order detail line level, the order level, or from the warehouse list for the item) as you add the item to the order. Using Interactive Reservation If using Interactive Reservation, no inventory is reserved until you run the Interactive Reservation program to selectively reserve inventory; see Working with Interactive Reservation (MIRV). Influences on Reservation Reservation occurs only if: • The Use OROB for Fulfillment Assignment (M31) system control value is unselected, or if selected, the item is not eligible for fulfillment assignment. See Brokered Backorders. • The order is not a future order – the system- calculated date is less than or equal to today's date (see the Arrival date field). • The Customer is not flagged to bypass reservation based on the <i>Bypass res</i> flag for the customer or the <i>Bypass reservation</i> flag for the customer class. • The quantity ordered of the item is not greater than or equal to the value in the Reserve qty (Reserve quantity limit) field for the item • The item is not frozen (Reservation freeze = Unselected in Item Warehouse table) • Reservations can be performed against the warehouse (Allocatable flag = Selected for the warehouse) When the item is reserved... If the item is available in the specified quantity, the system reserves the inventory so that no other order can take it and increases the reserve quantity in the Item/Warehouse record in the designated warehouse. When the item cannot be reserved... If no quantity is available of the item, the screen does not initially display the <i>Rsv</i> field for the item. The quantity ordered is in the <i>Avl</i> field as a negative number. The system backorders the item and updates the detail line with a backorder reason of No allocate. When the item is partially reserved... If the entire quantity ordered is not available for the item, the quantity that is available is reserved (and indicated in the <i>Rsv</i> field) and the quantity unavailable is backordered (and is a negative number in the <i>Avl</i> field). The system updates the detail line with a backorder reason of Not enough avail in whse. The system updates the <i>B/O</i> field on the Select Item Relationships Window if there is not enough inventory available to reserve the entire quantity ordered on the order detail line and the <i>Avl</i> value is negative. <i>Numeric, 5 positions; display-only, updated by the system.</i>

Field	Description
Quantity printed	The quantity of this item printed on pick slips. Blank during Order Entry, but updated after Pick Slip Generation. You can review the quantity printed through Order Maintenance or Order Inquiry. <i>Numeric, 5 positions; display-only, updated by the system.</i>
Quantity shipped	The number of units of this item that have been shipped. An item on an order is identified as “shipped” through the Confirmation program. Only items for which pick slips have been generated are eligible to be shipped. Blank during Order Entry. You can review the quantity shipped through Order Maintenance or Order Inquiry. <i>Numeric, 5 positions; display-only, updated by the system.</i>
Quantity returned	The number of units of this item on this order that have been returned. Only items that have been shipped can be returned. Blank during Order Entry. You can review the quantity returned through Order Maintenance or Order Inquiry. <i>Numeric, 5 positions; display-only, updated by the system.</i>
Quantity canceled	The number of units of this item that have been canceled from this order through Order Maintenance. Blank during Order Entry. You can review the quantity canceled through Order Maintenance or Order Inquiry. <i>Numeric, 5 positions; display-only, updated by the system.</i>

Field	Description
Quantity sold out	The number of units of this item on this order that have been identified as sold out. Sell Out in Order Entry You can identify an item as sold out during Order Entry if the item is unavailable and the customer wants to cancel the item from the order. Instead of simply deleting the item from the order and losing true demand, select Sell Out for the item to have an accurate count of the number of orders for this item. Based on this figure, you might increase the quantity ordered from your vendor. You cannot sell out an item that has been reserved. Sell Out Item Automatically In the Item table, you can mark an item as a sold out item by entering a value in the <i>S/O control</i> field. Some items will sell out: • Immediately • Immediately, when the item is no longer available in the warehouse (on-hand = 0) • Immediately, when the item is no longer available in the warehouse and you no longer have outstanding purchase orders for this item from your vendors (on-hand = 0 and on-order = 0). You can specify the quantity of the item that you expect to receive in returns, and that you will use to fulfill backorders. The system checks the projected return field only if the item has a soldout control status of 2 (include on-order quantity on purchase orders); see Working with Soldout Controls (WSLD). Updated during Order Entry if the item is sold out immediately; otherwise, the system updates this field when you use Processing Auto Soldout Cancellations (MASO). <i>Numeric, 5 positions; display-only, updated by the system.</i>
Reserved date	The date when the system reserved the item on this order. <i>Numeric, 6 positions (in user date format); display-only, updated by the system.</i>
Printed date	The date when the system printed pick slips for this item on this order. Blank during Order Entry and is updated after Pick Slip Generation. You can review this date through Order Maintenance or Order Inquiry. <i>Numeric, 6 positions (in user date format); display-only, updated by the system.</i>
Shipped date	The date when the item was confirmed for shipment. Blank during Order Entry. You can review this date through Order Maintenance or Order Inquiry. <i>Numeric, 6 positions (in user date format); display-only, updated by the system.</i>

Field	Description
Returned date	The date when a return was entered for the item on this order. Blank during Order Entry. You can review this date through Order Maintenance or Order Inquiry. <i>Numeric, 6 positions (in user date format); display-only, updated by the system.</i>
Canceled date	The date when a quantity ordered of this item was canceled through Order Maintenance. Blank during Order Entry. You can review this date through Order Maintenance or Order Inquiry. <i>Numeric, 6 positions (in user date format); display-only, updated by the system.</i>
Sold out date	The date when the item was sold out on this order, either during Order Entry or automatically by the system. The date can reflect the item entry date (if the item was sold out immediately during Order Entry) or a later date (if the item was sold out through Processing Auto Soldout Cancellations (MASO)). <i>Numeric, 6 positions (in user date format); display-only, updated by the system.</i>

Screen Option	Procedure
Enter notes about how to perform extra work on the item, such as alterations, engraving, monogramming, etc.	Select Special Handling to advance to the Work with Special Handling Screen . This option is not available if the additional charge code used for the special handling format is suppressed; see v for a discussion.
Review the quantities available to sell of this item in all shippable warehouses	Select Availability to advance to the Item Availability Screen .
Review any special pricing promotions for the item in this offer	Select Pricing to display the Display Quantity Pricing Window .
Enter messages about this item	Select Messages to advance to the Work with Order Line Messages Screen .

Display Open Purchase Orders Screen

Purpose: Use this screen to review expected deliveries of this item from open purchase orders placed with your vendors.

This screen shows you the warehouse where the items will be stored and the quantity expected in each delivery.

This information can help you predict when you will receive this item if it is not currently available (on-hand) in your warehouses. Information is obtained from [Maintaining Purchase Orders \(MPOE\)](#) and [Purchase Order Receipts](#).

Held purchase orders are not listed on this screen.

How to display this screen: Select Open POs for the item at the [Work with Order Lines Screen \(Adding Items to the Order\)](#)

Field	Description
Item	The code for a unit of inventory that you sell. Item codes are defined in and validated against the Item table. <i>Alphanumeric, 12 positions; display-only.</i>
SKU	The style associated with the item, such as its color or size. <i>Alphanumeric, three 4-position fields; display-only.</i>
Description (Unlabeled field to the right of the Item/SKU fields)	The description of the item. <i>Alphanumeric, 25 positions; display-only.</i>
Whs (Warehouse code)	The warehouse into which this item will be received. Warehouses are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS) . <i>Numeric, 3 positions; optional.</i>
PO #	The purchase order on which this item was ordered. Held purchase orders are not listed. <i>Numeric, 7 positions; display-only.</i>
Ln #	The line number on the purchase order on which this item was ordered. <i>Numeric, 3 positions; display-only.</i>
Vendor#	The code for the supplier from whom you purchase products or services. Vendors are defined in and validated against the Vendor table; see Working with Vendors (WVEN) . <i>Numeric, 7 positions; display-only.</i>
Name	The vendor's name. Blank if the Vendor Name Display (D41) field in the System Control table is unselected. <i>Alphanumeric, 30 positions; display-only.</i>
Qty due	The number of units of this item ordered that are not already used by backorders. Updated through the P.O. Layering program. See Purchase Order Layering and Backorder Notifications . <i>Numeric, 7 positions; display-only.</i>
Date (Expected delivery date)	The date on which the item is due to be received from the vendor. The expected delivery date is cleared once you receive the purchase order in Purchase Order Receiving. No date is indicated here if the item has been reserved or if there are no outstanding purchase orders for this item. <i>Numeric, 6 positions (in user date format); display-only.</i>

Item Availability Screen

Purpose: Use this screen to determine how many units of this item you have available to sell in your shippable warehouses only. These numbers do not include quantities in warehouses where you store defective items, items being returned to the vendor, purchase orders that were docked but not yet received, or items in any warehouse set up to be non-viewable in Order Entry.

**Note:**

This screen displays items in warehouses set up to be Viewable in O/E (Viewable in Order Entry). The Display Item Availability Screen displays items in warehouses for which the Allocatable flag is selected.

This information is useful because you can determine quickly where the item is available in the desired order quantity. The available quantity is the quantity of this item that is not reserved on other orders or backorders.

Each time an item is reserved, the system reduces the quantity available and updates the quantity open by the quantity ordered.

**Note:**

See [Merchandise Locator Process Overview](#) for information on searching for an item's availability across warehouses and stores through integration with Order Orchestration.

How to display this screen: Select Availability for the item at the [Work with Order Lines Screen \(Adding Items to the Order\)](#).

Field	Description
Item	The code for a unit of inventory that you sell. <i>Alphanumeric, 12 positions; display-only.</i>
SKU	The style of the item, such as its color or size. <i>Alphanumeric, three 4-position fields; display-only.</i>
Total avail	The quantity of this item that is available to sell in your shippable warehouses. <i>Numeric, 7 positions; display-only, updated by the system.</i>
Whs	The warehouse in which the item is currently available to be sold. Warehouse codes are defined in and validated against the Warehouse table. <i>Numeric, 3 positions; display-only.</i>
Description	The description of the warehouse. <i>Alphanumeric, 30 positions; display-only.</i>
Avail (Available)	The quantity of this item currently available to be sold in the warehouse. <i>Numeric, 7 positions; display-only, updated by the system.</i>
B/O (Backorder quantity)	The quantity of this item currently backordered in the warehouse. This means that the item was ordered on previous orders, but was not available for sale. Usually purchase orders are placed with your vendors for these backordered items. A negative sign indicates that the item is backordered. <i>Numeric, 7 positions; display-only, updated by the system.</i>

Field	Description
Open PO	The total quantity of this item in this particular warehouse that is due to be received on unreceived or partially received purchase orders. Enables you to estimate when the item will be received. <i>Numeric, 7 positions; display-only, updated by the system.</i>

Display Quantity Pricing Window

Purpose: Use this window to review any special pricing promotions for the item/offer.

Definition: You can establish quantity price breaks for the item, so that the customer can purchase the item for a lower price if ordering a sufficient quantity. Additionally, you can define a pricing column for a price break. Customers with this pricing column receive the special price automatically.

Setup: Quantity pricing specials are defined through Item/Offer; see [Assigning Items/SKUs to Offers](#). When you use this option, the system checks for a quantity pricing record in the table for the current offer. A message indicates if there is no quantity price break defined for the item in this offer:

Item Offer not found.

In response, you can change the offer code for the item to one that is running a quantity price break special. Select Change for the item to display the Quantity Pricing window.

You can assign a customer to a pricing column by entering a number in the [Price column](#) field in the Customer table. The customer automatically receives the price break for an item and pricing column, regardless of the quantity ordered.

For example, if the customer belongs to pricing column 02 and the price break record requires the customer to order a quantity of 10, the customer receives the discounted price *when ordering any quantity of the item*.

Receiving a quantity price break: This window lists each price break for an item. If the customer wants to increase the quantity ordered to receive the price break, select OK the item, select OK, then change the number in the Qty field. The system automatically reprices the item to reflect the quantity break price.

How to display this screen: Select Pricing for an item at the [Work with Order Lines Screen \(Adding Items to the Order\)](#).

Field	Description
Item	The code for a unit of inventory. <i>Alphanumeric, 12 positions; display-only.</i>
SKU	The style of the item, such as its color or size. <i>Alphanumeric, three 4-position fields.</i>
Description (Unlabeled field below the Item/SKU fields)	The description of the item. <i>Alphanumeric, 25 positions; display-only.</i>

Field	Description
Offer	The code for the catalog, newspaper, or space advertisement from which you accept orders. Offers are defined in and validated against the Offer table. Use the Item/Offer table to identify which items are carried in the offer. Also, use the Item Prices table to define price breaks for the item in the offer. <i>Alphanumeric, 3 positions; display-only.</i>
Description	The description of the offer. <i>Alphanumeric, 30 positions; display-only.</i>
Effective (Effective date)	The starting date for the item price break in this offer. This item quantity discount is available until the next effective date, if any. From the Effective date in the Item Prices table. <i>Numeric, 6 positions (in user date format); display-only.</i>
Qty (Quantity)	The quantity of the item that must be purchased to receive the price break. Any SKU ordered for this item is counted towards this quantity. This number is from the Quantity in the Item Prices table. If the quantity is 1, you are offering your customers an automatic discount if they purchase this item. If the quantity is greater than 1, your customers must purchase several units of the item (such as in different colors) to receive the price break. Customers assigned to the pricing column defined here receive the quantity break price automatically regardless of the quantity ordered. <i>Numeric, 7 positions; display-only.</i>
Price	The selling price of the item for your regular customers who order the required quantity of the item or who belong to the appropriate pricing column. Items eligible for the price break are repriced automatically and the system updates the pricing method field with *Quantity Break Price. <i>Numeric, 13 positions with a 2-place decimal; required, calculated by the system.</i>
Assoc	The selling price of the item for your associate customers (Associate = Selected in the Customer table) who order the required quantity of the item or who belong to the appropriate pricing column. Items eligible for the price break are repriced automatically and the system updates the pricing method field with *Quantity Break Price. <i>Numeric, 13 positions with a 2-place decimal; required, calculated by the system.</i>
Col (Column number)	The pricing column eligible for this price break. Customers belonging to this pricing column receive the quantity price break automatically, regardless of the quantity ordered. <i>Numeric, 2 positions; display-only.</i>

Work with Special Handling Screen

Purpose: Use this screen to define how to perform some type of extra work on an item by engraving, monogramming, altering it, etc. The item must be eligible for special handling ([Special handling](#) = Selected for the item offer or SKU offer).

The special handling instructions and the charge for this work print on the pick slip if your pick slip printing program supports it.

How to display this screen: See [Bypassing or Suppressing the Special Handling Screens](#) for a discussion of when you advance to this screen automatically, and when you can display it on demand.

Standard or custom screen? There are two different screens available where you can enter special handling information.

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

**Note:**

Drop ship orders display standard special handling instructions only if you process the orders using drop ship pick slips; drop ship purchase orders, including drop ship purchase orders created through the Order Orchestration Drop Ship interface, display only custom special handling instructions, not standard special handling instructions.

Custom special handling is a set of pre-formatted notes about how to work on an item, including charges for the custom special handling work. Custom special handling is entered on a screen which includes various fields that you need to complete to explain how to work on the item. Each activity is listed along with the valid responses.

You can work with the customer to define exactly what needs to be done to the item, using this screen as a guide to obtain complete and accurate information.

Special handling codes and formats: Special handling codes are defined in and validated against the Additional Charges table. In this table, you identify a code as a special handling code by entering S (standard format) or C (custom format) in the [S/H type \(Special handling type\)](#) field. If the code calls for a custom format, you must enter a custom format code in the S/H format (Special handling format) field. Custom special handling formats are defined in and validated against the Special Handling Format table; see [Establishing Custom Special Handling Formats \(WSHF\)](#).

When you set up a special handling code in the Additional Charges table, you also specify whether to advance to a special handling screen automatically, on-demand, or not at all in order entry when entering an item flagged for special handling in the item offer or SKU offer.

Special handling restrictions: You can restrict the type of special handling an item can receive based on item class. For example, you might want to restrict personalizing a t-shirt with an emblem if the process used to attach the emblem damages the t-shirt. A message indicates when you enter an additional charge code assigned to a restricted item class:

Additional charge code (EM) cannot be used with this item class (RST).

See [Working with Item Classes \(WICL\)](#) for more information on how to restrict special handling by item class.

For more information: See Special Handling Overview for information on how the system applies special handling charges based on your setup.

Field	Description
Available qty	The quantity of the item currently available to sell after accounting for the current order line. Item availability is calculated as follows: $\text{On hand} - \text{Protected} - \text{Reserved} - \text{Reserve Transfer} - \text{Backordered} = \text{Available quantity}$ This field is included only if the Hide Item Availability in Order Entry (J66) system control value is unselected.
	 Note: If the <i>Available Qty</i> shown is 0 or more, the system has already reserved the quantity on the current order. If the <i>Available Qty</i> shown is a negative amount, there is not enough inventory and the customer should be informed.
	See Display Inventory Warehouses Screen for more information.
	<i>Numeric, 7 positions; display-only.</i>
Order #	A number to identify an order. <i>Numeric, 8 positions; display-only, assigned by the system.</i>
Ship-to # (unlabeled field to the right of the order number)	A number to identify the shipping address on this order. The system assigns a sequential ship-to number to every order, even if the shipping address and the sold-to address are the same. The first ship-to address is assigned the number 1. <i>Numeric, 3 positions; display-only, assigned by the system.</i>
Line #	The line number of the item on the order. <i>Numeric, 3 positions; display-only.</i>
Sold To (Sold-to customer name)	The customer's last name, first name and initial, or the name of the company placing the order. <i>Alphanumeric, 41 positions; display-only.</i>
Ship To (Ship-to customer name)	The last name, first name and initial of the customer you are shipping the order to. <i>Alphanumeric, 41 positions; display-only.</i>
Item	The code for the item. <i>Alphanumeric, 12 positions; display-only.</i>
SKU (Unlabeled field to the right of the item number)	The style of the item, such as its color or size. <i>Alphanumeric, three 4-position fields; display-only.</i>
Special handling	The special handling code that identifies the type of work to be performed on the item. Special handling codes are defined in and validated against the Additional Charges table. See Special Handling Overview for more information. <i>Alphanumeric, 2 positions; display-only.</i>
Description (Unlabeled field to the right of the special handling code)	The description of the special handling code. <i>Alphanumeric, 30 positions; display-only.</i>

Field	Description
Item description (unlabeled field below Special handling field)	The description of the item. <i>Alphanumeric, 120 positions; display-only.</i>
Charge	The charge for performing the extra work on the item. This charge is added to the <i>Hnd</i> (Handling) totals on the order. Your entry here overrides the <i>S/H charge</i> defined for the item/SKU offer, if any. Leave this field blank if you are not charging the customer for this work.
 Note: If the Evaluate Special Handling Charges by Order Line (D67) system control value is selected, the special handling charge will be added to the order once per line no matter what the unit quantity. If this system control value is unselected, the charge will be multiplied by the unit quantity.	
Handling information	<i>Numeric, 13 positions with a 2-place decimal; optional.</i> Use this area of the screen to enter notes about how to work on the item. This information prints on the pick slip. You can use as much room as necessary to enter special handling instructions, but remember that this information prints on the pick slip so space is limited there. If you click OK at this screen without entering any information, the system still applies the special handling charge to the order. <i>Alphanumeric, 30 positions each line; optional.</i>

Screen Option	Procedure
Update the special handling instructions	Select Add/Change.
Remove the special handling from the item	Select Delete S/H then select OK at the delete- confirmation prompt.
Accept your entries, and add/retain the special handling charge	Click OK.

Work with Custom Special Handling Screen

How to display this screen: See Bypassing or Suppressing the Special Handling Screens for a discussion of when you advance to this screen automatically, and when you can display it on demand.

Example:

The customer is ordering a company emblem to be placed on a jacket.

During Order Entry, the custom special handling format screen opens:

- automatically if the item is set up with a custom special handling code (in the SKU/Offer or Item/Offer table), or
- if you enter a custom special handling code for the item during Order Entry.

You can use the custom special handling screen to help the customer define exactly how the item will be handled. The screen presents you with the options that can be performed on the item; in this case, emblem personalization. Each option is labeled and provides an input field where you enter the details the customer requests. Details for an input field can be defined as:

- a list of valid responses
- default text
- free-form style

You can use all three forms for a single item.

Valid responses: Valid responses are used when you want to limit the choices a customer can make on an item. You can display a list of the valid responses for an input field by clicking on the arrow. The Select Special Format Response screen opens. This screen lists each valid response along with the response description. Response descriptions display only if the [Display Special Format Response Descriptions in Order Entry \(E90\)](#) system control value is selected. Response descriptions are helpful if you use codes to identify each valid response. However, if you do not select a value at the Select Special Format Response screen, the system clears the previous entry in the *Input* field.

For example, the valid responses and response descriptions for the label *Size* are:

- 4786 (small)
- 4981 (medium)
- 5012 (large)

The customer must choose from this list; an invalid response produces the error:

Value entered is not a valid response.

Not all valid response fields have a default; default responses are used when one response is especially popular. To override the size, enter the valid size the customer requests.

Default text: Default text is text selected from the Customer Sold To table that defaults onto an input field when you enter the [Work with Custom Special Handling Screen](#). On the custom screen the default text *Company* was used.

You can confirm the default text with the customer and override it if necessary. For example, the default text for the customer's name is the first name, middle initial and last name. If the customer requests you use his or her full middle name, you can override the middle initial and enter the full name.

Free-form: You use the free-form style when no valid responses or default text have been defined for the input field. The free-form style is often used for more creative detail.

Maximum characters: In some instances, an input field has been defined with a maximum amount of characters that can be used. For example, on the custom screen, the label *Text* displays the number 10. This stands for the maximum number of characters that can be used for any other information you wish to print on the emblem, for example, first name.

The [Include Spaces in Special Handling Edit for Maximum Characters \(F80\)](#) system control value controls whether the system includes spaces in the number of characters of text used. For example, if this system control value is selected, and the operator enters *Julie Marie* in the

Text field, the system considers this name to be 11 characters. If this system control value is unselected, the system considers the name *Julie Marie* to be 10 characters.

If more characters are entered than are allowed, a message indicates:

Exceeds Maximum Characters Allowed.

A ruler above the input fields helps you count the number of spaces used in an input field when there are length restrictions.

Special handling rules: Optionally, you can define rules for a complex special handling format to help prevent the entry of special handling instructions that are inconsistent or that cannot be completed. If the special handling instructions entered at this screen violate a rule, the screen displays an error, such as: MGM LOCATION - center pocket response is not valid for POCKET - no pocket. You need to fix the error before accepting the special handling for the item. If there are multiple errors, the screen displays each error individually, and you need to fix each error before accepting.

See the [Work with Special Format Rules Screen](#) for more information on special handling rules.

Optional charges: In some instances, a charge is associated with an option. For example, on the custom screen, the option *Text* has a charge of \$2.00. If the customer requests additional text to print on the emblem, he or she will be charged \$2.00 in addition to the regular cost of the special handling. The system charges the customer for any feature options in which you have entered a valid value. Leave a feature option field blank to avoid adding the optional charge to the order.

Holding an order line based on special handling format: You can flag a special handling format to automatically put an order line on hold when it uses that format. See *Putting a Line on Hold through a Special Handling Format* for a discussion.

Completing the screen: To complete this screen, ask the customer what he or she would like for each detail line. If valid responses have been defined for an input field, list the options the customer can choose from. Confirm with the customer any text that defaults automatically in an input field and change it if necessary. Make sure the customer is aware of any optional charges that are associated with an option he or she requests.

Field	Description
Available qty	The quantity of the item currently available to sell after accounting for the current order line. Item availability is calculated as follows: On hand - Protected - Reserved - Reserve Transfer - Backordered = Available quantity This field is included only if the Hide Item Availability in Order Entry (J66) system control value is unselected.
	 Note: If the <i>Available Qty</i> shown is 0 or more, the system has already reserved the quantity of the current order. If the <i>Available Qty</i> shown is a negative amount, there is not enough inventory for the order.
	See Display Inventory Warehouses Screen for more information. <i>Numeric, 7 positions; display-only.</i>
Order #	The number used to identify an order. <i>Numeric, 8 positions; display-only.</i>
Ship to # (Unlabeled field to the right of the order number)	The number used to identify the shipping address on the order. <i>Numeric, 3 positions; display-only.</i>
Line #	The line number of the item on the order. <i>Numeric, 3 positions; display-only.</i>
Item	The code to identify a unit of inventory that you sell. <i>Alphanumeric, 12 positions; display-only.</i>
Description (Unlabeled field below Item code)	The item description. <i>Alphanumeric, 120 positions; display-only.</i>
SKU	A code to identify the style of the item, such as its color or size. <i>Alphanumeric, three 4-position fields; display-only.</i>
Special handling	The special handling code. See Special Handling Overview for more information. <i>Alphanumeric, 2 positions; display-only.</i>
Description	The description of the special handling code. <i>Alphanumeric, 25 positions; display-only.</i>

Field	Description
S/H price	The price you are charging the customer for the special handling. Included only if you have specified a S/H price (Special handling price) for the item/SKU offer; otherwise, the Charge, which defaults from the special handling format, is indicated instead. The default price specified for the item/SKU offer defaults, but you can override it if you have authority based on the Enter or Override S/H Price (B12) secured feature; otherwise, it is display-only. If the Evaluate Special Handling Charges by Order Line (D67) field in the System Control table is unselected, the charge for the special handling will be multiplied by the number of units ordered; otherwise, it will be added just once for each order line associated with custom special handling. The charge is added to the <i>Hnd</i> (Handling) bucket of the order totals. <i>Numeric, 13 positions with a 2-place decimal; optional or display-only.</i>
Space guide	A ruler displayed to assist operators in counting the number of spaces used on a detail line when there are line length restrictions. For example, you might limit engraving initials to three characters. The maximum number of characters you can allow on a detail line is 45. <i>Numeric, 45 positions; display-only.</i>
Label	The description of a special handling option defined for this custom special handling format. <i>Alphanumeric, 15 positions; display-only.</i>

Field	Description
Input	An entry field for you to enter the response to each special handling option available in the custom special handling format. You can click on the arrow at the <i>Input</i> field to display a list of valid responses and response descriptions; however, if you do not select a response from the subsequent screen, it clears the previous entry from the <i>Input</i> field and you will need to re-enter it. When you are using default text, the text defaults automatically from the customer sold-to table, allowing you to skip over those detail lines. If you need to, you can change the information displayed in the default text detail lines. A message indicates if you do not enter a value in a required field: Required field - a valid value must be entered. A message indicates if you have defined valid values for a field in the Special Handling Format table and you enter an invalid response: Value entered is not a valid response.  Note: You can enter upper and lower case text in an input field if the Enter Custom Special Handling in Upper and Lower Case (D65) field in the System Control table is selected.
Charge	<i>Alphanumeric, 45 positions; may be required.</i> The charge associated with an option in the custom special handling format. Only fields defined as feature options can carry a separate charge. Included only if you have not specified a S/H price (Special handling price) for the item/SKU offer; otherwise, the special handling price for the offer is in the S/H price field instead. The charge defaults from the custom special handling format; however, you can add or remove a charge only if you have authority based on the Enter or Override Personalization Charge (A40) secured feature. If the Evaluate Special Handling Charges by Order Line (D67) field in the System Control table is unselected, the charge for the special handling will be multiplied by the number of units ordered; otherwise, it will be added just once for each order line associated with custom special handling. The charge is added to the <i>Hnd</i> (Handling) bucket of the order totals. <i>Numeric, 13 positions with a 2-place decimal; optional.</i>

Screen Option	Procedure
Accept the special handling information for the item being ordered	Select Accept.

Screen Option	Procedure
Remove the special handling information associated with the item being ordered	Select Reject.

Display Coordinate Items Window

Purpose: Use this window to review the coordinate items associated with a primary item on the order for cross-selling purposes.

- [Display Sequence](#)
- [Assigning Coordinates to an Item](#)
- [To Cross-Sell Coordinates](#)
- [When There are No Coordinates in the Display Coordinate Items Window](#)
- [To Add Coordinates to the Order](#)
- [Display Coordinate Items Window](#)
- [Select Coordinate Items Window](#)

Display Sequence

This window displays item coordinates in coordinate sequence number order (lowest to highest).

- Coordinate items that are not assigned a sequence number are first.
- If more than one coordinate type has the same sequence number, item coordinates are listed alphanumerically by coordinate type.
- If more than one item coordinate is assigned to a coordinate type, item coordinates are listed alphanumerically by item number.

Assigning Coordinates to an Item

You can assign coordinate items to an item:

- at the [Work with Item Coordinates Screen](#) in the Work with Item/SKUs (MITM) menu option.
- at the Work with Item Coordinates Screen in the Work with Coordinates by Offer (WCIO) menu option.

See [Working with Item Coordinates \(WCIO\)](#) for an overview and additional setup.

To Cross-Sell Coordinates

When you enter an order for an item that is associated with any item coordinates:

- If the [Automatically Display Coordinate Items in Order Entry \(I53\)](#) system control value is selected and the Promo flag for the order type is set to Promo Price, the [Display Coordinate Items Window](#) opens automatically advance to the Display Coordinate Items window when you add an item associated with coordinate items to an order.
- Otherwise, the screen displays a message `Coordinate items exist for base item entered`. You must Select Coordinates for the item to advance to the [Display Coordinate Items Window](#) if this system control value is not selected and/or the *Promo* flag is set to None.

The system will cross-sell coordinates even if the primary item is soldout, on backorder, is a drop ship item, non-inventory item, or main set item. Additionally, the system will cross-sell coordinates that are a drop ship item, non-inventory item, or main set item.

When the system does not cross-sell coordinates: See the Automatically Display Coordinate Items in Order Entry (I53) system control value for a discussion of when the system prompts you to select coordinates for an item.

You can still select Coordinates for the primary item to advance to the [Display Coordinate Items Window](#); however, if all of the coordinates are on backorder or soldout or are not included in the same offer as the primary item, there are no coordinates available to select.

When There are No Coordinates in the Display Coordinate Items Window

You can still advance to the Display Coordinate Items window, but there will not be any coordinates if:

- they are all currently backordered, and the Display Backordered Coordinate Sale Items (F41) system control value is unselected, or
- none of the coordinates are in the same offer as the primary item (that is, the offer indicated on the order detail line for the item).

To Add Coordinates to the Order

To add a SKUed coordinate:

- At the [Display Coordinate Items Window](#), select a SKUed coordinate and select Display SKUs to advance to the [Select Coordinate Items Window](#).
- At the Select Coordinate Items window, enter the quantity of the SKUed coordinate that you wish to add to the order in the *Quantity* field. If you wish to add more than one coordinate to the order, enter a quantity for each coordinate, using the Next and Prev options to position to the coordinates that you wish to add.
- Once you have entered a quantity for each SKUed coordinate that you wish to add to the order, select OK. You return to the Display Coordinate Items window and a message indicates the coordinates have been added to the order: `Item has been added to current recipient.`

At this point you can:

- also add a non-SKUed coordinate to the order; see below.
- select OK or Exit to return to the Work with Order Lines screen.

To add a non-SKUed coordinate: At the [Display Coordinate Items Window](#):

- Enter the quantity of the non-SKUed coordinate that you wish to add to the order in the [Qty \(Quantity\)](#) field. If you wish to add more than one non-SKUed coordinate to the order, enter a quantity for each coordinate, using the Next and Prev options to position to the coordinates that you wish to add.
- Once you have entered a quantity for each non-SKUed coordinate that you wish to add to the order:
 - select OK. You return to the Work with Order Lines screen and a message indicates the coordinate has been added to the order: `Item has been added to current recipient.`
 - select Display SKUs to also add SKUed coordinates to the order. You advance to the [Select Coordinate Items Window](#) and a message indicates the non-SKUed coordinate has been added to the order: `Item has been added to current recipient.`

Note:

- If you enter a quantity for a coordinate, and then select another option, such as Information, for another coordinate, the system immediately adds the coordinate to the order as soon as you advance to the other screen. To verify that the coordinate has been added to the order, look for the message indicating that a coordinate is added to the order:
`Item has been added to current recipient.`
- If you enter a quantity for a coordinate, and then select another option, such as Information, for that same coordinate, the system advances you to the other screen, but does not add the coordinate to the order. You will need to reenter the quantity for the coordinate and select OK to add the coordinate to the order.
- When you select OK at the [Display Coordinate Items Window](#) to add a coordinate to the order, the system returns you to the Work with Order Lines screen. If you want to add additional coordinates to the order, you will need to select Coordinates for the primary item to return to the Display Coordinate Items window.
- If you select Exit at the [Display Coordinate Items Window](#) and you have defined a quantity for a coordinate, the system returns you to the Work with Order Lines screen, but does not add the coordinate to the order.
- If you use the *Coordinate* scan field to position to a specific coordinate:
 - the system removes the Next and Prev options from the window. You will need to use the scan field again to position to another coordinate.
 - you will not be able to add multiple coordinates to the order using the scan field. If you enter a quantity for a coordinate, and then use the scan field to position to a coordinate, the system clears the quantity you have defined.

Display Coordinate Items Window

Use this window to review the coordinate items associated with a primary item on the order for cross-selling purposes.

How to display this screen:

- Select Coordinates for the primary item at the [Work with Order Lines Screen \(Adding Items to the Order\)](#). If the item you select is not linked to any coordinate items, a message indicates: `Coordinate items do not exist for base item.`
- Select the Automatically Display Coordinate Items in Order Entry (I53) system control value and add an item associated with coordinate items to the order, provided the Promo flag for the order type is set to Promo Price; the system automatically opens this window.

Field	Description
Primary item	The primary item to which the coordinate items are linked. If the Display Item Alias (D56) system control value is selected, the alias is indicated here instead of the actual item code. Item codes are defined in and validated against the Item table. The description of the item is to the right. <i>Item code: alphanumeric, 12 positions; display-only.</i> <i>Description: alphanumeric, 120 positions; display-only.</i>
Offer	The offer associated with the primary item. Only coordinate items that are included in this offer display. Offer codes are defined in and validated against the Offer table. <i>Alphanumeric, 3 positions; display-only.</i>

Field	Description
Qty (Quantity)	Enter the quantity of the coordinate item to add to the order. When you select OK, the system returns you to the Work with Order Lines screen, adding the selected coordinate item to the order. Enterable only if the item does not have SKUs. To add a SKUed coordinate to the order, select Display SKUs for the item to advance to the Select Coordinate Items Window. See To Add Coordinates to the Order for instructions on adding a coordinate to the order. <i>Numeric, 5 positions; optional (non-SKUed items only).</i>
Coordinate	The item that is linked to the primary item for cross-selling purposes. To scan, enter a full or partial item code to display coordinates in alphanumeric order beginning with your entry. Which coordinates display? - Base items only: This window displays only non-SKUed items and base items of SKUed items. To review SKUs, select the base item and select Display SKUs; you advance to the Select Coordinate Items Window. - Backordered items: The window displays backordered items only if the Display Backordered Coordinate Sale Items (F41) system control value is selected; also, it always displays soldout items if there is stock on-hand but they were sold out with a soldout control value of <i>Sellout immediately</i>. - Same offer: Only coordinate items that are in the same offer as the primary item display. - Non-inventory: Non-inventory items always display. Alias The alias is indicated if the Display Item Alias (D56) system control value is selected; however, scanning is by actual item code only. <i>Alphanumeric, 12 positions; optional.</i>
Description	The first 25 positions of the description of the coordinate item. <i>Alphanumeric, 25 positions; display-only.</i>
Price	The unit price of the coordinate item. The system determines pricing for the coordinate item in the same way as other items. <i>Numeric, 13 positions with a 2-place decimal; display-only.</i>
Avail (Available)	The quantity of the coordinate item available for sale. A negative number indicates that the item is backordered. Blank for SKUed items. <i>Numeric, 7 positions; display-only.</i>
Page#	The page number of the offer where the coordinate item appears; from the Item Offer record. <i>Numeric, 5 positions; display-only.</i>
Ty (type)	A code representing a type of item coordinate, such as mandatory or optional. The type also controls the sequence in which to display coordinate items in this window. For example, coordinate items assigned to type S (strongly recommended) are before coordinate items assigned to type O (optional accessory). Coordinate type codes are defined in and validated against the Item Coordinate Type table; see Working with Item Coordinate Types (WICT). <i>Alphanumeric, 2 positions; optional.</i>

Field	Description
Message (Unlabeled field below the coordinate)	A persuasive or descriptive message about the item coordinate. <i>Alphanumeric, 70 positions; display-only.</i>

Screen Option	Procedure
Add a coordinate to the order	Enter the desired quantity in the <i>Quantity</i> field next to the coordinate and select OK. The system returns you to the Work with Order Lines screen. A message indicates that the coordinate has been added to the order. See To Add Coordinates to the Order for step-by-step instructions.
Exit the window without adding any coordinates to the order	Select Exit. The system returns you to the Work with Order Lines screen and does not add any coordinates to the order, even if you have defined a quantity for a coordinate.
Display or select SKUs for a SKUed item	Select Display SKUs for the coordinate to advance to the Select Coordinate Items Window . If you entered a quantity for a non-SKUed coordinate, the system adds the coordinate to the order at this time.
Review item availability information	Select Availability for a non-SKUed coordinate to advance to the Item Availability Screen . You can review item availability for a SKUed coordinate from the Select Coordinate Items Window .
Review pricing information	Select Pricing for a coordinate to advance to the Display Quantity Pricing Window . You can also review pricing for a SKUed coordinate from the Select Coordinate Items Window .
Review pending purchase orders	Select POs for a non-SKUed item to advance to the Display Open Purchase Orders Screen . You can review pending purchase orders for a SKUed coordinate from the Select Coordinate Items Window .

Select Coordinate Items Window

Purpose: Use this window to review information on the SKUs of a coordinate item, or to add one or more SKUs to the current order.

See [To Add Coordinates to the Order](#) for step-by-step instructions on how to add a coordinate to the order.

About SKU filtering: The [SKU Element for Order Entry Filtering \(F40\)](#) system control value controls which SKUs display initially at this pop-up window.

Normally, you would set this system control value to restrict the SKUs displayed when you initially advance to this window to the ones you think the customer will be most interested in purchasing. For example, if the customer orders a blazer in size 10, you might wish to filter the display to size 10 SKUs of the pants and skirt only. If you use SKU element 2 for size, you would then set the system control value to 2.

You can toggle back and forth between filtering SKUs and displaying all SKUs by selecting Toggle All SKUs/Order Line Match Only. On the right of the screen next to the options, a message indicates whether SKU filtering is currently on or off.

How to display this screen: Select Display SKUs for a SKUed coordinate at the [Display Coordinate Items Window](#).

Field	Description
SKU	The item's unique characteristics, such as its color and size. If the Display SKU Description in place of SKU Element (F25) system control value is selected, the SKU description is displayed here instead. Scanning on the SKU is not currently implemented. <i>Alphanumeric, three 4-position fields; optional.</i>
Exp dt (Expected delivery date)	The date when the SKU is due to be received from the vendor. No date is included here if there are no outstanding purchase orders for this SKU. This date is included for drop ship items only if the Assign Drop Ship Expected Ship Date (I59) system control value is selected. See that system control value for more information. <i>Numeric, 6 positions (in user date format); display-only.</i>
Exp qty (Next expected qty)	The quantity of this SKU expected on the next purchase order that can fulfill the current order, taking into account SKUs already promised to backorders on earlier purchase orders. <i>Numeric, 7 positions; display-only.</i>

Screen Option	Procedure
Add a coordinate SKU to the order	Enter the desired quantity in the <i>Quantity</i> field next to the coordinate SKU and select OK. You return to the Display Coordinate Items Window , where a message indicates that the coordinate has been added to the order. See To Add Coordinates to the Order for step-by-step instructions on how to add a coordinate to the order.

 Note:

There is only one message, regardless of how many coordinate items you add to the order.

Review item availability information	Select Avail for the SKU to advance to the Item Availability Screen .
Review pricing information	Select Pricing for the SKU to advance to the Display Quantity Pricing Window .
Review pending purchase orders	Select POs for the SKU to advance to the Display Open Purchase Orders Screen .
Switch between SKU filtering or displaying all SKUs	Select Toggle All SKUs/Order Line Match Only.

Work with Order Line Messages Screen

Purpose: Use this screen to enter a note about the item. This message may be informational only, or you can print it on the pick slip and/or invoice if your print program supports it.

Things to note:

- The messages you enter on this screen are for the current item only. See the [Work with Order Messages Screen](#) for messages you enter at the order level.
- There are an unlimited amount of fields for you to enter messages about the item on the order, but remember that space is limited if you are printing these messages on the pick slip or invoice.
- Each message line provides an option to print the message. Select Nowhere for the *Print* field if the message is informational only.
- In addition to entering messages in order entry, you can also receive them through the order API as part of a new order.
- The [Modify Existing Messages \(A30\)](#) secured feature controls the ability to change or delete an existing order line message.

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

To add a default message: Use the following steps to add a default message to the Work with Order Line Messages screen.

1. At the Work with Order Line Messages screen, select the prompt arrow next to a blank *Message* field to advance to the [Select Default Message Screen](#).
2. At the Select Default Message Screen, review and select a default message. When you select a default message, the system returns you to the Work with Order Line Messages screen and:
 - Defaults the value in the Message (Default text) field for the default message to the *Messages* field.
 - Defaults the value in the Print Code field for the default message to the *Print* field.
3. Optionally, modify the *Messages* field and *Print* field for the message line.

See [Working with Default Messages \(WMSG\)](#) for more information on default messages.

Duty charge message: The system writes an order message line if there is a duty charge for the item: 001.00% - Duty Used. See Setting Up the Country Table (WCTY) for more information on how the system calculates duty for the ship-to customer's country.

Selecting this option: Select Messages for an item at the [Work with Order Lines Screen \(Adding Items to the Order\)](#) or from the [Display Order Detail Screen \(Reviewing Order Line Detail\)](#).

Field	Description
Order #	A number to identify the order. <i>Numeric, 8 positions; display-only, assigned by the system.</i>
Sold To (Sold-to customer name)	The last name, first name and initial of the customer or the name of the company that is placing the order. <i>Alphanumeric, 41 positions; display-only.</i>

Field	Description
Ship To (Ship-to customer name)	The last name, first name and initial of the customer or the name of the company that you are shipping the order to. <i>Alphanumeric, 41 positions; display-only.</i>
Item	The code for a unit of inventory that you sell. <i>Alphanumeric, 12 positions; display-only.</i>
SKU	The style of the item, such as its color or size. <i>Alphanumeric, three 4-position fields; display-only.</i>
Messages	Use this area of the screen to enter notes about the item. You can print any of these messages by entering a print code in the <i>Print</i> field. You can also enter informational messages that do not print anywhere. Each message line is treated as a separate message on the system. Therefore, you can select different printing options for each message line. Default Message Select the prompt arrow next to a blank <i>Messages</i> field to advance to the Select Default Message Screen, where you can review and select a default message to default its message text and print code to the <i>Messages</i> and <i>Print</i> fields. Default messages are defined in and validated against the Default Message table. <i>Alphanumeric, 60 positions each line.</i>
Print	A code that controls whether the message prints. Valid values are: • Both = Print on invoice and pick slip • Invoices = Print on invoice only • Picks = Print on pick slip only • Nowhere = The message is informational and does not need to be printed. <i>Optional.</i>
Date	The date on which the message was entered. <i>Numeric, 6 positions (in user date format); display-only.</i>
User	The user ID of the person who entered the message. <i>Alphanumeric, 6 positions; display-only, updated by the system.</i>

Screen Option	Procedure
Change a message or print option	Select Add/Change. To change: Position your cursor in the message line and edit it as needed. You can also change the setting of the <i>Print</i> flag. Click OK when you are done. To delete: Double-click a message line to select it and then delete the text. You also need to clear the <i>Print</i> flag and click OK to delete the message.

 Note:

This option is not available if you do not have authority under the Modify Existing Messages (A30) secured feature.

Select Item Relationships Window

Purpose: Use this screen to find all items that belong to the same category of items (such as computers) and are compatible with each other (such as IBM products). Also, you can narrow down your search further by entering a price range. Only those items that meet these requirements are listed on the Item Relationship screen.

Once the Item Relationship screen opens, you can review the item's current availability, special item pricing promotions, and expected deliveries. Also, you can obtain additional information about the item.

You would use this option primarily if the customer is interested in finding out more about other items that you sell that may be compatible to or substituted for an item the customer is buying. From here, you can select items from this screen and add them directly to the order.

You can assign an item category and compatibility code to an item in the SKU table. Item categories are defined in and validated against the Item Categories table. You can enter any code in the *Compatibility* field.

For example, you might assign an item category code of HD ("Computer Hardware") and a compatibility code of 01 ("IBM-compatible") to these items: a CPU, a monitor, a modem, and a printer. In this way, item categories provide an easy way to find similar items or a different item that the customer can buy if the original item is not available.

How to display this screen: Select Relationships at the [Work with Order Lines Screen \(Adding Items to the Order\)](#).

Field	Description
Category	A high-level classification code for a group of items. This may represent a product group or merchandise class, such as “Computer Hardware.” Item category codes are defined in and validated against the Item Categories table. Enter an item category code in the <i>Itm category</i> field in the SKU table to assign an item to a category. You can run inventory reports based on item category. <i>Alphanumeric, 4 positions; required.</i>
Compatibility	A user-defined code to further classify items within an item category. Compatible items should be assigned the same compatibility code, such as, “IBM-Compatible.” Enter a code in the <i>Compatibility</i> field of the SKU table to assign a compatibility code to the item; the system does not validate this value. <i>Alphanumeric, 3 positions; optional</i>
Price range	The price range of the compatible items. Only items that are priced in this range and belong to the specified category and compatibility are listed. Leave the <i>Price range</i> fields blank to obtain a list of all compatible items, regardless of selling price. <i>Numeric, 13 positions with a 2-place decimal; optional.</i>

Instructions: Enter an item category code and optionally, a compatibility code and price range and select OK to advance to the [Display Item Relationship Screen](#).

Display Item Relationship Screen

How to display this screen: Enter an item category code, a compatibility code, and optionally, a price range at the [Select Item Relationships Window](#). This screen lists all the items that match your entries.

Field	Description
Category	A high-level classification code for a group of items. This may represent a product group or merchandise class, such as “Computer Hardware.” <i>Alphanumeric, 4 positions; required.</i>
Compatibility	A user-defined code to further classify items within an item category. <i>Alphanumeric, 3 positions; required.</i>
Qty	Enter the number of units of this item the customer wants to order. The system will add a detail line to the order for this item. <i>Numeric, 5 positions; required when selecting the item.</i>
Item	The code for a unit of inventory that you sell. <i>Alphanumeric, 12 positions; display-only.</i>
SKU	A code for the style of the item, such as its color or size. <i>Alphanumeric, three 4-position fields; display-only.</i>
Availability (Quantity available)	The number of units of the item available to sell. <i>Numeric, 7 positions; display-only, updated by the system.</i>

Field	Description
Action	Displays Added to order when you select an item from this screen for the order. <i>Alphanumeric, 14 positions; display-only.</i>
Description (unlabeled field below Item field)	The description of the item. <i>Alphanumeric, 25 positions; display-only.</i>

Screen Option	Procedure
Select an item for the order	Select the item, enter the quantity to order for the item, and then select Select. Added to order displays in the <i>Action</i> field indicating the item has been selected for the order.
Display the quantity available to sell of an item	Select Availability for an item to advance to the Item Availability Screen .
Display any special price breaks for an item	Select Pricing for an item to display the Display Quantity Pricing Window .
Review the expected deliveries of this item from your vendors	Select Open POs for an item to advance to the Display Open Purchase Orders Screen .

Upselling the Customer in Order Entry

Purpose: Several features are available in the system to upsell customers.

These are specials by which the customer can purchase items at a discounted price or receive them for free. When you upsell the customer, you offer the customer the chance to purchase unsolicited items in exchange for some type of incentive item.

Promotional pricing windows may open automatically during Order Entry when the customer's order points to an offer, source code, customer class, state, payment type, item class, or day of the week for which a promotion has been defined.

In this topic:

- [Upselling with Promotional Pricing](#)
 - [Select Incentive Item Screen](#)
 - [Select Incentive Group Window](#)
 - [Incentive Price Window](#)
- [Upselling with Special Source Prices](#)
- [Upselling with Price Breaks](#)
- [Upselling with Accompanying Items](#)

Cross-selling: You can also cross-sell the customer by suggesting items related to an item the customer is buying. For example, if the customer orders a blazer, you can suggest a coordinating skirt or blouse. A message indicates when the customer orders an item associated with coordinate items; you can then select Coordinates for the item to display and select coordinates. See [Working with Items on the Order](#).

Restrictions: The system may suppress a promotional pricing window if there is an item restriction or there is no available inventory for the items on special.

The order type controls whether promotional pricing windows open. No promotional pricing windows open during Order Maintenance.

Capturing history: The system tracks the demand (number of orders) and sale (number shipped) of upsell items separately from all other items. This allows you to analyze the number and dollar value of items that are sold as part of an upsell promotion.

Free gifts: The system applies free gifts to the order after you select the Reprice option and complete any pop-up windows. See [Applying Free Gifts](#) for more information.

Upselling with Promotional Pricing

Purpose: Promotional pricing specials enable the customer to receive incentive items free of charge or at reduced prices, based on the items or dollar amount on the order.

Incentive eligibility: A promotional pricing window opens only when:

- The customer places an order from a source code/offer in which a promotion has been defined, *and*
- The customer orders:
 - a specific quantity from a pre-defined group, *or*
 - a specific quantity of an item, *or*
 - a certain dollar value of merchandise, *and*
- The [Promo pricing \(Promotional pricing\)](#) field in the Source record (WSRC) is selected, *and*
- The *Promo windows* field in the Order Type record (WOTY) is set to a Promo (promotional pricing), *and*
- Item/SKU offer prices exist for the items/SKUs on the order in the offer associated with the promotion (either the offer is specified for the promotion or is associated with the source code specified for the promotion)

Examples of incentives:

- Buy any two different items from group 100, receive 50% off the third
- Spend over \$50.00 and receive item AB100 at no charge
- Buy item BB100, receive an item from group 200 for \$5.00
- Buy item CC100, receive \$10.00 off another unit of item CC100

Types of Promotional Pricing Windows and Screens

The system displays the [Select Incentive Group Window](#) or the [Select Incentive Item Screen](#) during Order Entry if the order meets the requirement for the promotional pricing. The logic that the system uses to determine which screen or window to display is described below.

If there is a single incentive item: If the promotional pricing specifies any quantity of a single incentive item, the system displays the [Select Incentive Item Screen](#), regardless of whether the item is offered at no charge, with an incentive price, or with a dollar or percentage discount. For example, the promotional pricing might specify one unit at no charge, or up to five units at a reduced price. You can either:

- Add the item to the order up to the maximum allowable quantity by completing the *Quantity* field. You have this option for non-SKUed items, or for SKUed items when it is the individual SKU that is listed on the screen.

- If the item has SKUs and only the base item is listed on the screen, advance to the [SKU Scan Screen](#) by completing the *Quantity* field. At the SKU Scan screen, you can add the selected quantity of a SKU to the order by selecting Select for a SKU.
- Exit the screen without adding the item.

Incentive group at no charge or an incentive price: If the promotional pricing specifies any quantity of items within a specified group at either no charge or at a specific incentive price, the system displays the [Select Incentive Group Window](#). You can:

- Add an item to the order by completing the *Quantity* field. You have this option for non-SKUed items, or for SKUed items when it is the individual SKU that is listed on the screen. Press the Tab key three times to advance to the *Qty* field.
- If the item has SKUs and only the base item is listed in the window, advance to the [SKU Scan Screen](#) by completing the *Quantity* field. At the SKU Scan screen, you can add the selected quantity of a SKU to the order by selecting Select for a SKU.
- Changing a selected item, SKU or quantity: Once you have completed the *Quantity* field, you cannot change your selection to a different item or SKU without rejecting and then re-entering the order. To select two different SKUs of the same item, you should first enter the desired quantity of the first SKU and then select it at the SKU scan screen; then, when you return to the [Select Incentive Group Window](#), enter the desired quantity of the next SKU so that you can select that SKU at the SKU Scan screen. (**Note:** If you select multiple items or SKUs using these steps, you will need to exit the window once you have selected all desired incentives; the window will not close automatically.)
- Exit the window without adding an item to the order.

Incentive group at dollar or percentage discount: If the promotional pricing specifies any quantity of items within a specified group with either a dollar or percentage discount, the system displays the [Select Incentive Group Window](#). In this situation, you have the added option to review the discounted price of any item in the group by selecting Incentive price for the item. For example, if the promotional pricing includes a 20% discount, you can see what the selling price of a given item will be after applying this discount to the regular price. You can:

- Add an item to the order by completing the *Quantity* field. You have this option for non-SKUed items, or for SKUed items when it is the individual SKU that is listed on the screen. Press the Tab key three times to advance to the *Qty* field.
- Review the discounted incentive price of the item by selecting Incentive price for the item. You have this option for non-SKUed items, or for SKUed items when it is the individual SKU that is listed on the screen.
- If the item has SKUs and only the base item is listed in the window, your selection at the window advances you to the [SKU Scan Screen](#). At this screen:
 - If you completed the *Quantity* field at the [Select Incentive Group Window](#), you can add the selected quantity of a SKU to the order by selecting Select for a SKU.
 - If you selected Incentive price for the item at the Select Incentive Group window, you can select Options on/off and then select Incentive price for the SKU to review the incentive price. You can also complete the *Quantity* field at the SKU Scan screen to select the quantity of the SKU.

**Note:**

If you select multiple items or SKUs using these steps, you will need to exit the window once you have selected all desired incentives; the window will not close automatically.

- Exit the window without adding an item to the order.

What if the order qualifies for more than one type of promotional pricing? If you enter an item that qualifies the order for more than one type of promotional pricing, the system displays the promotional pricing records in alphanumeric order based on Promotion ID.

Select Incentive Item Screen

Purpose: The system displays this window when the items on an order meet the qualifications for promotional pricing, as set up through [Work with Promotional Pricing \(WPRP\)](#).



Note:

If you enter an item that qualifies the order for more than one type of promotional pricing, the system displays the promotional pricing records in alphanumeric order based on Promotion ID.

Field	Description
Customer qualifies...	The maximum quantity of the incentive item that the customer can select when ordering a specific quantity of an item. The system ensures that the customer adds only this quantity of the incentive item to the order. Taken from the <i>Qty limit</i> field in the Promotion Pricing record.
	 Note: Although the system does not allow you to exceed this quantity at the Select Incentive Item Screen, the Select Incentive Group Window, or the SKU Scan Screen, it is still possible to change the order line to a higher quantity afterward, for example at the Work with Order Lines Screen (Adding Items to the Order) or in order maintenance.
At... (Promotional price of the item)	<i>Numeric, 5 positions; display-only.</i> The price for which the customer can purchase the incentive item. If price is .00, the system adds the item to the order at no charge. The system calculates or derives the price from your entries at the Promotion Pricing Screen (Add Mode). On orders subject to VAT, the <i>Incentive tax price</i> is indicated.
Item (Item code)	<i>Numeric, 13 positions with a 2-place decimal; display-only.</i> The code for the incentive item, as defined in the Promotion Pricing record, if the incentive is a specific item or in the Promotion Pricing Group record, if the incentive item belongs to a predefined group. All items are defined in the Item table.
Description	<i>Alphanumeric, 12 positions; display-only.</i> The description associated with the incentive item, taken from the <i>Description</i> field in the Item record. <i>Alphanumeric, 30 positions; display-only.</i>

Field	Description
Order qty (Quantity)	The quantity of the incentive item that will be added to the order; the system validates that this value is not greater than the value in the <i>Qty limit</i> field in the Promotion Pricing record (which is at the top of the Promotional Pricing pop-up window). <i>Numeric, 5 positions; required.</i>

Completing this screen: To add the item to the order, enter a quantity not greater than the maximum. If the item has SKUs and only the base item is listed on the screen, you advance to the [SKU Scan Screen](#) when you enter a *Quantity*. At the SKU Scan screen, you can add the selected quantity of a SKU to the order by selecting Select for a SKU.

Optionally, you can also exit the screen without adding the item.

Select Incentive Group Window

Purpose: The system displays this window when the items on the order qualify for a group promotion. See [Upselling with Promotional Pricing](#) for an overview.



Note:

If you enter an item that qualifies the order for more than one type of promotional pricing, the system displays the promotional pricing records in alphanumeric order based on Promotion ID.

Field	Description
Select up to...	The maximum number of incentive items that can be added to the order, based on the items ordered from a pre-defined promotional pricing group. The system ensures that the customer adds only this quantity of the incentive item to the order. Taken from the <i>Qty limit</i> field in the Promotion Pricing record.



Note:

Although the system does not allow you to exceed this quantity at the [Select Incentive Item Screen](#), the [Select Incentive Group Window](#), or the [SKU Scan Screen](#), it is still possible to change the order line to a higher quantity afterward, for example at the [Work with Order Lines Screen \(Adding Items to the Order\)](#) or in order maintenance.

Special price

Numeric, 5 positions; display-only.

The price for which the customer may purchase the incentive item. The window displays a *Special price* if an Incentive price is specified for the promotion price record. If the No charge flag is set, the special price displayed is .00, and the system adds the item to the order at no charge.

Numeric, 13 positions with a 2-place decimal; display-only.

Field	Description
Additional discount of...%	The discount percentage that the system subtracts from the unit selling price of each selected incentive item. The window displays this discount percentage only if an Incentive disc % is specified for the promotion price record. You can select Incentive price for an item to advance to the Incentive Price Window, which displays the unit selling price after subtracting the discount percentage. <i>Numeric, 3 positions with a 2-place decimal; display-only.</i>
Additional discount of...\$	The discount amount that the system subtracts from the unit selling price of each selected incentive item. The window displays this discount amount only if an Incentive disc \$ is specified for the promotion price record. You can select Incentive price for an item to advance to the Incentive Price Window, which displays the unit selling price after subtracting the dollar discount. <i>Numeric, 13 positions with a 2-place decimal; display-only.</i>
Qty (Quantity)	The quantity of the incentive item that will be added to the order. The system validates that this value is not greater than the value in the <i>Qty limit</i> field in the Promotion Pricing record (which is at the top of the Promotional Pricing pop-up window). If you select multiple items or SKUs, the system validates that the total quantity selected does not exceed the <i>Qty limit</i>. <i>Numeric, 5 positions; required.</i>
Item (Item number)	The code for the incentive item, as defined in the Promotion Pricing record (if the incentive is a specific item) or in the Promotion Pricing Group record (if the incentive item belongs to a predefined group). All items are defined in the Item table. <i>Alphanumeric, 12 positions; display-only.</i>
Description	The description associated with the incentive item, taken from the <i>Description</i> field in the Item table. <i>Alphanumeric, 30 positions; display-only.</i>

Completing this window: Your options at this window are:

Adding an item to the order: Complete the *Quantity* field. Depending on whether the item has SKUs:

- If the item you select does not have SKUs, or if it is a specific SKU of a SKUed item, entering the quantity adds the item to the order. Press the Tab key three times to advance to the *Qty* field.
- If the item has SKUs and only the base item is listed in the window, when you enter a quantity as described above you advance to the [SKU Scan Screen](#). At this screen, you can add the selected quantity of a SKU to the order by selecting **Select for a SKU**.

Reviewing the discounted incentive price for an item: Select Incentive price for the item:

- If the item you select does not have SKUs, or if it is a specific SKU of a SKUed item, you advance to the [Incentive Price Window](#).
- If the item has SKUs and only the base item is listed in the window, you advance to the [SKU Scan Screen](#). At this screen, you can select **Options on/off** and then select Incentive price for the SKU to review the original offer price and the incentive price. You can also complete the *Quantity* field at the SKU Scan screen to select the quantity of the SKU.

Changing your selections: Once you have added an incentive item to the order by completing the *Quantity* field at this window, you cannot delete it and substitute another incentive item or SKU in its place. Also, once you have exited this window, you cannot redisplay it for the current order. However, you can always delete an incentive item from the order as you would any other item.

Exiting the window: Optionally, you can exit the window without adding an incentive item to the order.

Incentive Price Window

Purpose: Use this window to review the regular offer price and the discounted incentive price for an item displayed at the [Select Incentive Group Window](#).

How to display this screen: Select Incentive price for an item at the [Select Incentive Group Window](#).

Field	Description
Item	The item you selected for review at the Select Incentive Group Window . The description is below the item. <i>Item: alphanumeric, 12 positions; display-only.</i>
Incentive price	The unit price of the item after applying the <i>Incentive discount %</i> or the <i>Incentive discount \$</i> specified at the Promotion Pricing Screen (Add Mode). <i>Numeric, 13 positions with a 2-place decimal; display-only.</i>
Offer price	The regular unit price of the item based on the offer, using the regular pricing logic. <i>Numeric, 13 positions with a 2-place decimal; display-only.</i>

Upselling with Special Source Prices

Purpose: The system calculates an item discount automatically when the customer orders an item in a specific quantity using a source code for which a special source price promotion exists.

Definition: Use the Item/Source Prices record to define the source code, required order quantity, discounted price for regular customers, and discounted price for associate customers.

The system determines that the item will be discounted if the order points to a source code with a special source price record, and the customer orders at least the number in the Qty field. This is a form of quantity break pricing because, usually, the price of the item is reduced as the customer orders a greater quantity.

No pop-up window opens to inform the customer of this discount; however, the system updates the order detail line with *Special Source Price as the pricing method.

Upselling with Price Breaks

Purpose: You can offer the customer the chance to purchase a specific quantity of an item at a reduced price, based on the offer used on the order. Additionally, offer price breaks can be defined for pricing columns so that, when a customer assigned to a pricing column places an order, the customer is eligible for the price breaks regardless of the quantity ordered.

See [Display Quantity Pricing Window](#).

Upselling with Accompanying Items

Accompanying items are added to the order automatically at no charge or for a set price when the customer orders the originating item, or "trigger item," in a specific quantity and for a

specific offer. This activity is automated so that the order entry operator does not have to remember to add this item to the order. No pop-up window opens to notify the operator that the system is adding an accompanying item to the order. In addition, certain updates to the originating item in order entry also update the accompanying item.

The system also adds accompanying items to an order in order maintenance if the [Add Accompanying Items in Order Maintenance \(H28\)](#) system control value is selected. When you ship the order, the system ensures that the originating item and accompanying item ship together.

Examples: These examples illustrate two different situations in which the system adds an accompanying item to an order:

Product information pamphlet: You can define a product information pamphlet as the accompanying item. The pamphlet is added to the order at no charge. Each time the customer orders the originating item in the required quantity from the offer, the system adds one product information pamphlet to the order.

Cleaning solution: You can set up a bottle of cleaning solution as the accompanying item each time the customer orders a set of pans. The cleaning solution is automatically added to the order at its regular price.

For more information:

- [Defining Accompanying Items](#)
- [Adding an Accompanying Item in Order Entry](#)
- [Updating the Originating Item in Order Entry](#)
- [Updating the Accompanying Item in Order Entry](#)
- [Accompanying Items in Order Maintenance](#)

Defining Accompanying Items

Use the [Work with Accompanying Item Screen](#) to define accompanying items for a specified item/SKU and offer.

For each accompanying item that you define, you must indicate:

- the required order quantity of the originating item in order to add the accompanying item to the order; for example, you must order 2 of the originating item to add the accompanying item to the order
- the accompanying item/SKU to add to the order
- the quantity of the accompanying item to add to the order (either a specific quantity or the same quantity as the originating item)
- whether there is a charge for the accompanying item (accompanying items are added at no charge, or at the regular price according to your pricing hierarchy)

Accompanying item hierarchy: If you define an accompanying item at the SKU Offer and Item Offer level, the system:

1. If the item you order qualifies for the accompanying item at the SKU Offer level, adds the accompanying item defined at the SKU Offer level to the order.
2. If the item you order does not qualify for the accompanying item at the SKU Offer level, but does qualify for the accompanying item at the Item Offer level, adds the accompanying item defined at the Item Offer level to the order.

Adding an Accompanying Item in Order Entry

The system evaluates whether to add an accompanying item automatically to the order when:

- you add the originating item to the order.
- you change the originating item on the order and an accompanying item is not yet defined for the originating item.

If the order quantity of the originating item meets the [Required qty \(Originating item required quantity\)](#) defined for the accompanying item, the system adds the accompanying item automatically to the order.

Example: The following accompanying item is set up for item A.

Required qty	Item
3	B

- If the customer orders item A for a quantity of 1, the system does not add the accompanying item to the order since the originating item's order quantity does not meet the *Required quantity* for the accompanying item.
- If the customer changes the order quantity for item A to 2, the system does not add the accompanying item to the order since the originating item's order quantity does not meet the *Required quantity* for the accompanying item.
- If the customer changes the order quantity to 3, the system adds accompanying item B to the order since the originating item's order quantity now meets the *Required quantity* for the accompanying item.
- If the customer changes the order quantity to 4, the system does not evaluate whether to add an accompanying item to the order since an accompanying item is already defined for the originating item.

Order quantity of accompanying item: The [Use order qty \(Use originating item order quantity\)](#) field for the accompanying item determines the quantity of the accompanying item that is added to the order.

- If the *Use order quantity* is No, the system adds the accompanying item to the order for the quantity specified in the [Acc qty \(Accompanying item quantity\)](#) field.

Example: If the *Accompanying item quantity* is 1, when the customer orders 3 of the originating item, the system adds 1 accompanying item automatically to the order.

- If the *Use order quantity* is Yes, the system adds the same quantity of the accompanying item to the order as the quantity of the originating item.

Example: When the customer orders 3 of the originating item, the system adds 3 accompanying items automatically to the order.

Price of accompanying item: The [Free?](#) field for the accompanying item defines whether there is a charge for the accompanying item that is added to the order.

- If the *Free?* field is Yes, the system adds the accompanying item to the order free of charge (the *NC (no charge)* field for the order line is Y).
- If the *Free?* field is No, the system adds the regular price of the accompanying item to the order totals.

If more than one accompanying item is defined for an originating item: If you have more than one accompanying item defined for an originating item, the system uses the [Required qty \(Originating item required quantity\)](#) for the accompanying item to determine which accompanying item to add to the order.

Example: The following accompanying items are set up for item A.

Required qty	Item
1	B
2	C
4	D

- If a customer orders item A for a quantity of 1, the system adds accompanying item B to the order.
- If a customer orders item A for a quantity of 2, the system adds accompanying item C to the order.
- If a customer orders item A for a quantity of 3, the system adds accompanying item C to the order. The system adds accompanying item C to the order because the *Required quantity* for this accompanying item is closest to, but not greater than, the order quantity of the originating item.
- If a customer orders item A for a quantity of 4, the system adds accompanying item D to the order.

Identifying the originating and accompanying item: When the system adds the accompanying item to the order, the system:

- updates the *Accompanying item indicator* field in the Order Detail table for the originating item with T to indicate that the order line contains the originating item, or trigger item, associated with the accompanying item.
- updates the *Accompanying item indicator* field in the Order Detail table for the accompanying item with A to indicate that the order line contains the accompanying item. In addition, the system updates the *Accompanying item trigger line* field in the Order Detail table with the order line sequence number for the order line that contains the associated originating item.

If you have multiple accompanying items on the order, the system uses the *Accompanying item indicator* field and *Accompanying item trigger line* field in the Order Detail table to determine which accompanying item is associated with which originating item. In addition, the system uses these fields to determine which accompanying item to update when you update the originating item on the order; see [Updating the Originating Item in Order Entry](#).

Cannot add accompanying item with set: The system does not add an accompanying item to the order if it is associated with a set item.

Updating the Originating Item in Order Entry

When you perform the following updates to the originating item in order entry, the system determines if the accompanying item should also be updated:

- [Deleting the Originating Item](#)
- [Increasing the Order Quantity of the Originating Item](#)
- [Decreasing the Order Quantity of the Originating Item](#)
- [Selling Out the Originating Item](#)

Deleting the Originating Item

When you delete the originating item from the order, the system also deletes the accompanying item from the order.

If the accompanying item is a set item, the system deletes the accompanying item and its component items from the order.

Increasing the Order Quantity of the Originating Item

When you increase the order quantity of the originating item on the order, the system looks at the setting of the *Use Order Quantity* field for the accompanying item to determine if the order quantity of the accompanying item should also increase.

- If the *Use Order Quantity* field for the accompanying item is set to No, the system does not increase the order quantity for the accompanying item when the order quantity for the originating item increases.

Example: The following accompanying item is set up for item A:

Required qty	Item	Accompanying Qty	Use Order Qty
2	B	1	No

A customer orders item A for a quantity of 2. Because the *Required quantity* is reached and *Use order quantity* is No, the system adds item B to the order for a quantity of 1. The customer then decides to increase the order quantity for item A to 3. Because *Use order quantity* is No, the system does not update the order quantity for item B and instead, retains the order quantity of 1.

- If the *Use Order Quantity* field for the accompanying item is set to Yes, the system increases the order quantity for the accompanying item to match the quantity of the originating item.

Example: The following accompanying item is set up for item A:

Required qty	Item	Accompanying Qty	Use Order Qty
2	B	1	Yes

A customer orders item A for a quantity of 2. Because the *Required quantity* is reached and *Use order quantity* is Yes, the system adds item B to the order for a quantity of 2. The customer then decides to increase the order quantity for item A to 3. Because *Use Order Quantity* is Yes, the system updates the order quantity for item B to 3 as well.

If the originating item now qualifies for the accompanying item: If the original order quantity of the originating item did not meet the *Required quantity* for the accompanying item, but you increase the order quantity of the originating item and it now meets the *Required quantity* for the accompanying item, the system adds the accompanying item to the order.

Example: The following accompanying item is set up for item A:

Required qty	Item
3	B

A customer orders item A for a quantity of 1. Because the *Required quantity* is not reached, the system does not add item B to the order. The customer then decides to increase the order quantity for item A to 3. Because the *Required quantity* is now reached, the system adds item B to the order.

If the originating item now qualifies for a different accompanying item: If the system has already added an accompanying item to the order for the originating item, and you increase the order quantity of the originating item so that the originating item now meets the *Required*

quantity for another accompanying item, the system does not add this accompanying item to the order, but instead keeps the original accompanying item that was added to the order.

Example: The following accompanying items are set up for item A:

Required qty	Item
1	B
2	C
4	D

A customer orders item A for a quantity of 1. Because the *Required quantity* is reached, the system adds item B to the order. The customer then decides to increase the order quantity for item A to 2. Even though the *Required quantity* is reached for a different accompanying item (item C), because an accompanying item has already been added to the order for the originating item, the system does not add item C to the order and instead retains accompanying item B.

To apply a different accompanying item to an originating item: In order to update the order with the accompanying item that is closest to, but not greater than, the order quantity of the originating item, you should:

- delete the originating item from the order and reenter the originating item for the updated order quantity. In the example above, when you delete originating item A from the order, the system also deletes accompanying item B from the order. When you reenter originating item A on the order for an order quantity of 2, the system adds accompanying item C to the order.
- delete the accompanying item from the order and then select Change for the originating item on the order so that the system reevaluates the accompanying items defined for the originating item. In the example above, when you delete accompanying item B from the order and then select Change for the originating item to update the order quantity to 2, the system adds accompanying item C to the order.

Decreasing the Order Quantity of the Originating Item

When you decrease the order quantity of the originating item on the order, the system looks at the setting of the *Use Order Quantity* field for the accompanying item to determine if the order quantity of the accompanying item should also decrease.

- If the *Use Order Quantity* field is set to No, the system does not decrease the order quantity of the accompanying item when you decrease the order quantity of the originating item.

Example: The following accompanying item is set up for item A:

Required qty	Item	Accompanying Qty	Use Order Qty
3	B	2	No

A customer orders item A for a quantity of 4. Because the *Required quantity* is reached and *Use order quantity* is No, the system adds item B to the order for an order quantity of 2. The customer then decides to decrease the order quantity for item A to 3. Because *Use order quantity* is No, the system does not update the order quantity for item B and instead, retains the order quantity of 2.

- If the *Use Order Quantity* field is set to Yes, the system decreases the order quantity for the accompanying item to match the quantity of the originating item.

Example: The following accompanying item is set up for item A:

Required qty	Item	Accompanying Qty	Use Order Qty
3	B	2	Yes

A customer orders item A for a quantity of 4. Because the *Required quantity* is reached and *Use order quantity* is Yes, the system adds item B to the order for an order quantity of 4. The customer then decides to decrease the order quantity for item A to 3. Because *Use order quantity* is Yes, the system updates the order quantity for item B to 3 as well.

If the originating item no longer qualifies for the accompanying item: If by decreasing the order quantity of the originating item on the order means the *Required quantity* for the accompanying item is no longer reached, the system removes the accompanying item from the order.

Example: The following accompanying item is set up for item A:

Required qty	Item
3	B

A customer orders item A for a quantity of 3. Because the *Required quantity* is reached, the system adds item B to the order. The customer then decides to decrease the order quantity for item A to 2. Because the *Required quantity* is no longer reached, the system deletes item B from the order.

If the originating item now qualifies for a different accompanying item: If the system has already added an accompanying item to the order for the originating item, and you decrease the order quantity of the originating item so that the originating item now meets the *Required quantity* for another accompanying item, the system does not add this accompanying item to the order. In addition, because the originating item no longer meets the *Required quantity* for the accompanying item that was originally added to the order, the system deletes the accompanying item from the order.

Example: The following accompanying items are set up for item A:

Required qty	Item
1	B
2	C
4	D

A customer orders item A for a quantity of 4. Because the *Required quantity* is reached, the system adds item D to the order. The customer then decides to decrease the order quantity for item A to 2. Even though the *Required quantity* is reached for a different accompanying item (item C), because an accompanying item has already been added to the order for the originating item, the system does not add item C to the order. In addition, because the *Required quantity* for accompanying item D is no longer reached, the system deletes accompanying item D from the order.

**Note:**

After the system deletes the accompanying item from the order, if you select Change for the originating item, the system reevaluates the accompanying items defined for the originating item, and if the *Required quantity* for one of the accompanying items is reached, the system adds this accompanying item to the order. In the example above, if you select Change for originating item A, the system adds accompanying item C to the order since the originating item's order quantity is 2.

Selling Out the Originating Item

If you manually sell out the originating item, the system also sells out the accompanying item.

If the system automatically sells out the originating item, the system adds the accompanying item to the order and immediately sells out the order line.

If the accompanying item is a set item, the system sells out the accompanying item and its component items on the order.

Updating the Accompanying Item in Order Entry

Once the accompanying item is added to the order in order entry, you can perform regular order entry updates to the order line. However, you cannot manually increase the order quantity of the accompanying item; if you try to increase the order quantity, you receive an error message: *This is an accompanying item, the qty cannot be increased.*

Deleting the Accompanying Item and then Updating the Originating Item

If you delete the accompanying item from the order, and then update the originating item, the system reevaluates the accompanying items defined for the originating item and if the order quantity of the originating item qualifies for an accompanying item, the system adds the accompanying item to the order.

Example: The following accompanying item is set up for item A:

Required qty	Item
3	B

A customer orders item A for a quantity of 3. Because the *Required quantity* is reached, the system adds accompanying item B to the order. You then delete item B from the order. The customer then decides to increase the order quantity for originating item A to 4. Because the system reevaluates accompanying items when you update the originating item on the order, the system adds accompanying item B to the order.

Updating the Accompanying Item and then Updating the Originating Item

If you update an accompanying item whose [Use order qty \(Use originating item order quantity\)](#) is set to Yes, and then update the originating item, the system overrides the update you made to the accompanying item in the following scenarios:

If you increase the order quantity of the originating item: If you decrease the order quantity of the accompanying item, but then increase the order quantity of the originating item, the system also updates the order quantity of the accompanying item to match the order quantity of the originating item.

Example: The following accompanying item is set up for item A:

Required qty	Item	Accompanying Qty	Use Order Qty
3	B	1	Yes

A customer orders item A for a quantity of 3. Because the *Required quantity* is reached and *Use order quantity* is Yes, the system adds accompanying item B to the order for an order quantity of 3. You then decrease the order quantity for item B to 1. The customer then decides to increase the order quantity for originating item A to 4. Because *Use order quantity* is Yes, the system also updates the order quantity for item B to 4.

If you decrease the order quantity of the originating item: If you decrease the order quantity of the accompanying item, but then decrease the order quantity of the originating item, the system also updates the order quantity of the accompanying item to match the order quantity of the originating item.

Example: The following accompanying item is set up for item A:

Required qty	Item	Accompanying Qty	Use Order Qty
3	B	1	Yes

A customer orders item A for a quantity of 4. Because the *Required quantity* is reached and *Use order quantity* is Yes, the system adds accompanying item B to the order for an order quantity of 4. You then decrease the order quantity for item B to 1. The customer then decides to decrease the order quantity for originating item A to 3. Because *Use order quantity* is Yes, the system also updates the order quantity for item B to 3.

If the required quantity for the accompanying item is no longer reached: If you decrease the order quantity of the accompanying item, but then decrease the order quantity of the originating item to a quantity that no longer meets the *Required quantity* for the accompanying item, the system removes the accompanying item from the order.

Example: The following accompanying item is set up for item A:

Required qty	Item	Accompanying Qty	Use Order Qty
3	B	1	Yes

A customer orders item A for a quantity of 3. Because the *Required quantity* is reached and *Use order quantity* is Yes, the system adds accompanying item B to the order for an order quantity of 3. You then decrease the order quantity for item B to 1. The customer then decides to decrease the order quantity for originating item A to 2. Because the *Required quantity* for accompanying item B is no longer reached, the system deletes item B from the order.

Accompanying Items in Order Maintenance

The Add Accompanying Items in Order Maintenance (H28) system control value controls whether the system adds accompanying items in both order entry and order maintenance, or in order entry only.

If you select this system control value, the system adds an accompanying item to the order automatically when you add an item designated for accompanying items to the order in order maintenance. The accompanying item will also be added to the order if you select the designated item as the exchange (replacement) item in order maintenance or Work with Return Authorizations.

**Note:**

When you update the originating item in order maintenance, the system does not update the accompanying item. For example, if you sell out the originating item in order maintenance, the system does not also sell out the accompanying item.

Expanding the Address in Order Entry

Purpose: Use the [Expand Name/Address Screen](#) to enter or verify additional customer address information that does not appear on the initial order entry screen, such as:

- Additional address lines
- Additional (third) telephone number

Why complete this screen? It is useful to complete this screen when you need to enter an international or business address, or when the customer provides additional address information, so that the customer record is as accurate as possible.

**Important:**

Your entries to this screen update the Sold-to customer record automatically.

You can complete the Expanded Address screen at any time during order entry or Customer Maintenance.

Any customer name and address information entered on the initial order entry screen defaults to the Expanded Address screen. You can change any of this information or add to it by completing any of the remaining fields.

How can you tell if a customer has information? If a sold-to or ship-to customer record includes a third or fourth address line, a plus sign (+) appears by the customer's name or address in order entry, order maintenance, and standard order inquiry. If the extended address information includes other fields -- such as the second address line or a third phone number -- but not the third or fourth address line, the plus sign does not appear.

Streamlined order inquiry always displays the entire address for the customer.

Oracle Retail Customer Engagement customer integration: When you use the Oracle Retail Customer Engagement customer integration, if you update customer information in order entry, Order Administration sends the customer information to Oracle Retail Customer Engagement so that the customer records in the two systems are synchronized. See the [Customer Engagement Customer Integration](#) for more information.

Expand Name/Address Screen

How to display this screen: Select Expanded Address at the [Work with Order Screen](#).

Field	Description
Sold-to (Sold-to customer number)	A number assigned by the system to identify the customer. The system assigns a Sold-to number to every customer placing an order. <i>Numeric, 9 positions; display-only, assigned by the system.</i>

Field	Description
Order#	A unique number assigned by the system to identify an order. <i>Numeric, 8 positions; display-only, assigned by the system.</i>
Ship-to number (unlabeled field separated by the Order # field by a hyphen)	Indicates the number of shipping addresses on the order. The system assigns a sequential ship-to number to every order, even if the shipping address and the sold-to address are the same. The first ship-to address is assigned the number 1. <i>Numeric, 3 positions; display-only, assigned by the system.</i>
Order date	The processing date for the order. The order date defaults to the current date, but you can override it. <i>Numeric, 6 positions (in user date format); display-only).</i>
Attention	The person who should receive the order. <i>Alphanumeric, 30 positions; optional.</i>
Name	5 fields are available for you to enter the customer's full name: Prefix A title that belongs before the customer's name, such as "Mrs." or "Dr." <i>Alphanumeric, 3 positions; optional.</i> First Name The customer's first name. <i>Alphanumeric, 15 positions; optional.</i> Initial The initial of the customer's middle name. <i>Alphanumeric, 1 position; optional.</i> Last Name The customer's last name. <i>Alphanumeric, 25 positions; required if Company has not been entered.</i> Suffix An addition to the customer's full name, such as "M.D.", "Fr.", or "III." <i>Alphanumeric, 3 positions; optional.</i>
Company	The name of the company placing the order. <i>Alphanumeric, 30 positions; required if Last name has not been entered.</i>

Field	Description
Address	Four address fields are available for you to enter a complete and specific customer address. Address line #1 The customer's street address. This is the primary delivery address. Shipping to a Post Office Box To ship to a Post Office Box, enter <code>POST OFFICE BOX</code>, <code>POST BOX</code>, or any variation of <code>PO BOX</code> (with or without spaces or non-alphabet characters, such as <code>P.O. BOX</code>), and the box number in the customer's street address. During order processing, the system validates that the carrier can ship to a post office box (as defined in the Ship Via table). Example: Enter <code>P.O. Box 9999</code> in the <i>Street</i> field to indicate delivery to a post office box instead of a home or company address.

 Note:

If you type `POST OFFICE BOX`, `POST BOX`, or any variation of `PO BOX` in the customer's street address during order entry or through the Order API, the system automatically selects the *PO box* field for the customer. However, if you remove this text from the customer's street address, the system does not automatically deselect the *PO box* flag.

 Note:

When you create a customer outside of order processing, you need to select the *PO box* field manually. Selecting the *PO box* field manually only applies in Work with Customers (WCST).

Alphanumeric, 32 positions; required.

Address lines #2-#4

(unlabeled fields under initial *Address* field) Additional address fields for international or business addresses. Although the primary delivery address (address line #1) is required, you may add additional address lines when necessary to pinpoint a customer's address.

Alphanumeric, three 32-position lines; optional.

Field	Description
Apt/Suite (Apartment/Suite)	The customer's apartment, suite, rural route or floor number. You can enter any type of information in this field to further identify the address. This information prints next to the primary street address on labels. To enter an apartment or suite address: 1. Enter APT to indicate an apartment or STE to indicate a suite. 2. Insert a space. 3. Enter the number of the apartment or suite, such as: APT 4 or STE 1164A. <i>Alphanumeric, 10 positions; optional.</i>
Postal code	The postal or zip code for this customer. Required? A postal code is required only if the <i>Require postal code?</i> flag for the country is selected; see Setting Up the Country Table (WCTY). Default city and state? If the system control value Use Zip/City/State Defaulting? (B13) is selected, you can enter the postal code to have the system default the associated city and state. Postal code validation: If a postal code is required, it is validated against the Zip/City/State (Postal Code) table; see Setting Up the Zip/City/State (Postal Code) Table (WZIP). Tax rates: The Postal Code table includes valid postal code/city/state combinations, and may also contain tax rates. You can purchase a listing of the valid combinations from your post office or you can enter each postal code/city/state combination manually. SCF/ship via validation: If you enter a postal code and the <i>Perform ship via edit?</i> flag for the country is selected, the system validates the SCF/ship via combination against the SCF Ship Via table when you complete the order; see Working with SCF/Ship Via Values (WSHV). <i>Alphanumeric, 10 positions; required or optional based on country.</i>
City	The city where the customer lives or receives mail or shipments. <i>Alphanumeric, 25 positions; required.</i>
St (State)	The state or province where the customer resides or receives mail or shipments. If you entered a postal code at a scan screen before selecting Create to create a new customer, the related state defaults; but you can override it. Defined where? State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Required? A state is required only if the <i>Require state?</i> flag for country is selected. See Setting Up the Country Table (WCTY). SCF validation: If the <i>Require postal?</i> flag for the country is selected, the system validates that the state you enter is assigned to the SCF associated with the postal code. See Working with SCF Codes (WSCF) for background. <i>Alphanumeric, 2 positions; required or optional based on country.</i>
Ctry (Country)	The code for the customer's country. Country codes are defined in and validated against the Country table. <i>Alphanumeric, 3 positions; required.</i>

Field	Description
Delivery	Identifies a business (commercial) or residential address. Used when you ship an order by a carrier that uses business or consumer rate tables (such as UPS). - Business = Business rate table used to determine shipping charges. - Residence = Residential rate table used to determine shipping charges. - No Distinction = No distinction between business and residential (not valid for UPS). <i>Required.</i>
Cust class (Customer class code)	A code that categorizes the consumer environment at a high level for reporting purposes. You can use a customer class code to: - direct offerings to a limited customer group - restrict item sales to a group of customers, for example, restricting the sale of guns to minors - set a default for bypassing item reservation for a group of customers - generate a list of customers for reporting purposes, or segment reports by class code If the customer is a new customer, the system uses the Default Customer Class in Order Entry (D63). If the customer is an existing customer, the assigned customer class code defaults. If you enter a new customer class code in this field, the system updates the Customer Sold To table with the code you entered. Required? The Require Customer Class (H85) system control value defines whether this field is required. Secured? The Maintenance of Customer Class Field (B07) secured feature defines whether you can enter or maintain the customer class field at this screen. See Setting Up the Customer Class Table (WCCL) on working with customer classes. <i>Numeric, 2 positions; optional.</i>
Mail	Identifies whether to send mail to the customer. Valid values are: - selected= Send mail to the customer. - unselected = Do not send mail to the customer. The setting of the Default Mail Name (D10) system control value, if any, defaults here.
Rent	Identifies whether to include the customer's name in lists that you rent. Valid values are: - selected = Rent the customer's name. - unselected = Do not rent the customer's name. The setting of the Default Rent Name (D11) system control value, if any, defaults here.

Field	Description
OptIn	Indicates the preferred method of correspondence. Valid values are: • O1 (All) = Email is the preferred method of correspondence. • O2 (Order) = Use email for order-related correspondence only; generate a document for other correspondence. • O3 (None) = Do not use email for any correspondence; generate a document instead. • O4 (Don't Ask) = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified.
	 Note: The above values use the letter O, not the number 0 (zero).
	The system updates this field when you change the setting of the <i>Opt in/Opt out</i> value at any other screen, such as customer maintenance, order maintenance, or catalog requests. When you update this setting: The opt-in/out setting is not stored on the order itself. When you change the opt-in/out setting here, the system updates the opt-in/out setting for the email address used on the order in the Customer Sold To Email Address table. If the order-level email address is also the customer's primary email address, the system also updates the customer's default opt-in/out setting. See Email Address Updates through Interactive Order Entry for more information. Email notifications: See When Does the System Generate an Email Notification? for an overview. <i>Required.</i>
Mail code	Indicates when, and under what circumstances, to send mail to the customer. Enables you to define the customer's mail preferences with more precision than the <i>Mail</i> flag. Mail codes are defined in and validated against the Mail/Call Code table; see Working with Mail/Call Codes (WMCC). If you leave this field blank, the value from the <i>Mail</i> flag defaults. <i>Alphanumeric, 3 positions; optional.</i>
Call code	This code specifies how often, and under what conditions, you will call the customer. Call codes are defined in and validated against the Mail/Call Code table. See Working with Mail/Call Codes (WMCC). <i>Alphanumeric, 3 positions; optional.</i>

Field	Description
Telephone	The customer's day, evening and third (fax or mobile) phone numbers. The Third Phone Number Type (L53) system control value determines whether the third phone number is labeled the <i>Fax</i> or <i>Mbl</i> (mobile) number. Phone number format: You can define a telephone number format to map to the phone numbers operators enter into the system. Telephone number formats are defined by arranging numbers and special characters such as hyphens and parenthesis in the same order and position as the numbers in a phone number would display. When an operator enters a phone number, the system compares the number of numeric characters in the phone number with the telephone number formats you have defined. In order to match a format, the phone number must have the same number of numeric positions as a telephone number format. If the system cannot find a match, the phone number does not map to a telephone number format and displays as it was entered by the operator. Example: An operator enters a phone number containing 10 numbers: 5085550100 The telephone number format used in the United States to represent an area code, local exchange and local phone number is: (508) 555-0100 When an operator enters a phone number containing 10 numbers (as in the example), the phone number displays so that the first 3 numbers are in parenthesis and a hyphen is between the sixth and seventh numbers, regardless of how the operator entered it into the system. If an operator enters a phone number containing 6 numbers, for example 5550100 and no format exists for 6 numbers, the phone number would display as it was entered (5550100). See Setting Up the Country Table (WCTY). <i>Alphanumeric, 14 positions; optional.</i>
Ext (Extension)	The extension of the customer's telephone numbers. <i>Alphanumeric, 4 positions; optional.</i>
Email address	The email address for this order. Order-level email address: The email address defaults from the customer's primary email address. A plus sign (+) indicates that there are additional email addresses on record for the customer. When you click OK, the system adds the order-level email address to the Customer Sold To Email Address table, if it is not already there. See Working with an Order-Level Email Address for more information. Email format validation: See Email Address Validation for information on how the system verifies that your entry is formatted correctly. Email notifications: This field must contain an email address for the system to send the customer automatic email notifications, such as backorder or soldout notifications. See When Does the System Generate an Email Notification? Fraud checking: The order goes on EO hold if this email address matches an email address in the Miscellaneous Fraud table; see Working with Miscellaneous Frauds (WMFF). <i>Alphanumeric, 50 positions; optional.</i>

When you complete this screen: When you select OK, the system updates the Sold-to customer record automatically from your entries to this screen.

**Note:**

The [Display/Update Bill to Screen](#) opens in order entry, order maintenance and in Work with Customers when you change the name or address of a Sold-to customer who is linked to a permanent Bill-to customer. The screen enables you to apply the changes you have made to the Sold-to address to the Bill-to address.

Screen Option	Procedure
Exclude the recipient	Select Exclude Recipient. This option is not implemented on the Expand Name/Address Screen .

Using a Permanent Shipping Address in Order Entry

Purpose: Use this function to select a shipping address on file for the customer, or to enter a new shipping address for the order that will be linked permanently to the customer and kept on file.

In this topic:

- Histories:
 - [Mail History](#)
 - [Item History](#)
 - [Order History](#)
- [Select Ship To Window](#)
- [Change Customer Ship To Screen \(Using, Changing, or Excluding a Shipping Address\)](#)
- [Select Customer Ship To Window \(Scanning for a Shipping Address\)](#)
 - [Alphabetic Scan](#)
 - [Numeric Scan](#)
- [Create Customer Ship To Screen](#)

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

One advantage of linking a permanent shipping address to the customer is that you can search for the address on file instead of reentering the address. This is a useful feature for business-to-business customers or customers who repeatedly ship to an alternate address.

Oracle Retail Customer Engagement customer integration: A customer's permanent shipping addresses are not included in the information that Order Administration sends to Oracle Retail Customer Engagement when you use the Oracle Retail Customer Engagement customer integration. See the [Customer Engagement Customer Integration](#) for more information.

Capturing history: You control what type of mail, order, and item history the system displays by the numeric value you enter in the *Track item history* field for the sold-to customer. These values are available:

Value	Type of Tracking
1	No item history tracking
2	Sold-to level only
3	Sold-to and ship-to

The system assigns a value of 2 to all customers that you create through Order Entry. You can change the item history tracking level through the Work with Customers function. If at any point you change the value from 2 to 3 for a sold-to customer, you will be able to review all item history for the related ship-to customers. See [Reviewing Customer History](#).

If this value is set to 3, you can review mail, order, and item history information for the ship-to customer from the sold-to customer record. This is useful if you want to target future catalog mailings to ship-to customers.

Mail History

The system captures this offer mailing history automatically for each customer ship-to address:

- Source code
- Source description
- Mail date

Item History

The system captures this item history automatically for each customer ship-to address:

- Item number
- SKU
- Date ordered
- Quantity ordered
- Order total

Order History

The system captures this order history automatically for each customer ship-to address:

- \$ on order
- Active since
- Life-to-date totals
- orders
- sales
- returns
- cancels
- exchanges
- sold outs
- Last credit card number and expiration date

- Last order type
- Last pay type
- Last source
- Last mail date

Additionally, the system captures order and sales history details for the quantity and amount ordered and posted to sales (product actually shipped).

Select Ship To Window

This window displays the shipping addresses already on file for the customer. At this point, you can:

- select the appropriate shipping address to ship the order to this address, or
- select Next to view additional addresses (if needed), or
- select Create/Scan to advance to the [Select Customer Ship To Window \(Scanning for a Shipping Address\)](#), where you can refine your search for a ship-to customer. You can also advance to the [Create Customer Ship To Screen](#). At this screen, you can enter an additional shipping address if the desired address is not on file for the customer.

Shipping restrictions: If one or more items on the order is restricted from being shipped to the state or country of the ship to address you have selected, a message indicates:

One or more items on the order line are restricted to new Shipping country/state.

See [Entering Additional Item Information](#), for information on item/state restrictions.

Tax calculation: If the customer has a tax exemption at the state level, you need to clear the tax-related fields in order to prompt the system to recalculate the tax on the order based on the new shipping address. See [Working with Customer Tax Status](#) for an overview.

How to display this window: Select Address Book at the [Work with Order Screen](#) if there are ship-to customers associated with the sold-to customer. If not, you advance directly to the [Select Customer Ship To Window \(Scanning for a Shipping Address\)](#).

Field	Description
Cust (Customer number)	A number assigned by the system to identify the customer who is placing the order or requesting a catalog. <i>Numeric, 9 positions; display-only, assigned by the system.</i>
Ship To (Ship To customer number)	A number that identifies this customer's shipping address. The system adds the shipping address to the Customer Ship To table under the customer number (Sold To Customer number) and a suffix (Ship To Customer number). For example, a customer places an order and requests that you ship the order to his business address. If the customer's customer number is 13248, the customer's office address (shipping address) would be filed under number 13248- 001 . The customer calls back and places another order, but asks you to ship the order to his beach house. You can select Cust Ship To to scan for this address. Only the customer's office address is listed in the pop-up window. Once again, you can add the new shipping address by selecting Create. The system will file the shipping address under number 13248- 002 . <i>Numeric, 3 positions; optional.</i>

Field	Description
Name/Address	The address where you are shipping this order. The address includes this information: Company name The name of the company to receive the order, if available. The shipping address must contain either the company name or customer name. Alphanumeric, 51 positions; display-only. Customer name The name of the customer to receive the order. The name consists of the prefix (such as "Mr.", "Mrs.", "Dr.", etc.), first name, last name, and suffix (such as "Jr.", "M.D.", etc.). Alphanumeric, 51 positions; display-only. Address The delivery address, which is made up of the street, city, state, and postal code <i>Alphanumeric, 50 positions; display-only.</i>

Change Customer Ship To Screen (Using, Changing, or Excluding a Shipping Address)

How to display this screen: Select a shipping address at the [Select Ship To Window](#). If there is already a ship-to selected for the order, you can also display this screen by selecting Ship To at the:

- [Work with Order Screen in Order Maintenance](#)
- [Work with Order Lines Screen](#)
- [Enter Payment Methods Screen in Order Maintenance](#)
- [Create Customer Bill To Screen](#)
- [Change Customer Bill To Screen \(Selecting, Changing, or Excluding a Billing Account\)](#)
- [Work with Order Messages Screen](#)

To use: Select OK at this screen to use this address as the shipping address on the current order.

To change: Enter over any information you want to update. The current order will ship to the new shipping address, if you changed address information. Also, the system saves the new shipping information for the customer.

Each of the fields on this screen are described under [Create Customer Ship To Screen](#).

Shipping restrictions: If one or more items on the order is restricted from being shipped to the state or country of the ship to address you have selected, a message indicates:

One or more items on the order line are restricted to new Shipping country/state.

See [Entering Additional Item Information](#), for information on item/state restrictions.

To exclude: Select Exclude from order to remove this shipping address from the current order.

Removing the shipping address is necessary if you select the address, then decide to ship the order to another address. The system attaches the shipping address automatically to the order when you select a shipping address. After you select Exclude from order, you can select another address or use the customer's home address (billing address) as the order shipping address.

Select Customer Ship To Window (Scanning for a Shipping Address)

To scan: Enter information in any of the scan fields on this window to locate the desired shipping address for the order.

How to display this screen: Select Address Book at the [Work with Order Screen](#) if there are currently no ship-to customers associated with the sold-to customers. Otherwise, you advance to this window by selecting Create/Scan at the [Select Ship To Window](#).

Scan fields: Enter information in the scan fields. You advance to a scan screen that lists the shipping addresses that closely match the information you entered. You can search using the customer's match code, postal code and last name, postal code and company name, last name only, company name or telephone number.

You can enter partial or full information into any of the scan fields. For example, you can enter J or JONES in the *Last name* field to locate the shipping address for Howard Jones.

We recommend that you be as specific as possible when you enter scan information to narrow down the number of shipping addresses that match your entries.

The scan screen that opens includes the shipping addresses that closely match the information you entered. The shipping addresses are listed alphabetically or numerically, starting with the first address that matches the scan information.

Alphabetic Scan

For example, the scan screen lists these names if you enter J in the *Last name* field:

JACOBSON

JAMESBURY

JONES (etc.)

However, the scan screen lists these names if you enter JONES in the *Last name* field:

JONES

JONESBURY

JONESTON (etc.)

Numeric Scan

The scan screen lists these postal codes if you enter 0 in the *Postal code* field:

01519

01527

01560 (etc.)

However, the scan screen lists these postal codes if you enter 02062 in the *Postal code* field:

02062

02069

02074

If you find the shipping address, select it. The current order will be shipped to this address.

If you are not sure that the address is the one you want to ship to, select Display for it. This allows you to verify the address before you attach it to the current order. If the address is the right one, select it to ship the current order to this address.

If you do not find the desired address, you can continue your search by selecting Next to display additional shipping addresses on file for the customer or you can select Create to add a new shipping address.

Create Customer Ship To Screen

Purpose: Use this screen to enter a permanent shipping address for the customer.

The system uses this address for the current order and files the address under the customer number in the Customer Ship To table. Also, this address is in the window the next time you enter a new order for the customer and select Address Book to use a permanent shipping address.

Shipping restrictions: If one or more items on the order is restricted from being shipped to the state or country of the ship to address you have selected, a message indicates:

One or more items on the order line are restricted to new Shipping country/state.

See [Entering Additional Item Information](#), for information on item/state restrictions.

How to display this screen: Select Create/Scan at the [Select Ship To Window](#).

Field	Description
Order#	A number to identify an order. <i>Numeric, 8 positions; display-only, assigned by the system.</i>
Ship-to number (unlabeled field to the right of the Order#)	A number to identify the shipping address. <i>Numeric, 3 positions; display-only, assigned by the system.</i>
Sold-to (Sold-to customer number)	A number to identify the customer who places the order or requests a catalog. <i>Numeric, 9 positions; display-only, assigned by the system.</i>
Customer name	The full name of the person to whom you are shipping the order, which may include: Prefix The customer's title, such as "Mr.", "Mrs.", "Dr.", etc. <i>Alphanumeric, 3 positions; optional.</i> First name The customer's first name. <i>Alphanumeric, 15 positions; optional.</i> Initial The initial of the customer's middle name. <i>Alphanumeric, 1 position; optional.</i> Last name The customer's last name. <i>Alphanumeric, 25 positions; required if you do not enter a Company.</i> Suffix The suffix to the customer's name, such as "Jr.", "III", "M.D.", etc. <i>Alphanumeric, 3 positions; optional.</i>
Company	The name of the company to which you are shipping the order. <i>Alphanumeric, 30 positions; required if you do not enter a customer name.</i>

Field	Description
Address	The full address to which you are shipping the order. Address line #1 The street address. This is the primary delivery address. Shipping to a Post Office Box To ship to a Post Office Box, enter POST OFFICE BOX, POST BOX, or any variation of PO BOX (with or without spaces or non-alphabet characters, such as P.O. BOX), and the box number in the customer's street address. During order processing, the system validates that the carrier can ship to a post office box (as defined in the Ship Via table). Example: Enter P.O. Box 9999 in the <i>Street</i> field to indicate delivery to a post office box instead of a home or company address.

 Note:

If you type POST OFFICE BOX, POST BOX, or any variation of PO BOX in the customer's street address during order entry or through the Order API, the system automatically selects the *PO box* field for the customer. However, if you remove this text from the customer's street address, the system does not automatically deselect the *PO box* flag.

 Note:

When you create a customer outside of order processing, you need to select the *PO box* field manually. Selecting the *PO box* field manually only applies in Work with Customers (WCST).

Alphanumeric, 32 positions; required.

Address lines #2-#4

(unlabeled fields under the *Address* field): Additional lines for you to enter address information.

Alphanumeric, 32 positions each line; optional.

**Apt/Suite (Apartment/
Suite)**

The apartment, suite, rural route or floor number for this address, if any.

This information prints next to the primary street address on labels.

To enter an apartment or suite address

1. Enter APT for an apartment or STE for a suite.
2. Press the space bar once.
3. Enter the number.

Alphanumeric, 10 positions; optional.

Field	Description
Postal code	The postal or zip code for the shipping address. Required? A postal code is required only if the <i>Require postal code?</i> flag for the country is selected; see Setting Up the Country Table (WCTY). Default city and state? If the system control value Use Zip/City/State Defaulting? (B13) is selected, you can enter just the postal code to have the system default the associated city and state. Postal code validation: If a postal code is required, it is validated against the Zip/City/State (Postal Code) table; see Setting Up the Zip/City/State (Postal Code) Table (WZIP). Tax rates: The Postal Code table includes valid postal code/city/state combinations, and may also contain tax rates. You can purchase a listing of the valid combinations from your post office or you can enter each postal code/city/state combination manually. SCF/ship via validation: If you enter a postal code and the <i>Perform ship via edit?</i> flag for the country is selected, the system validates the SCF/ship via combination against the SCF Ship Via table when you complete the order; see Working with SCF/Ship Via Values (WSHV). <i>Alphanumeric, 10 positions; required or optional based on country.</i>
City	The city to which you are shipping the order. <i>Alphanumeric, 25 positions; required.</i>
St (State)	The state or province where you are shipping the order. Defined where? State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Required? A state is required only if the <i>Require state?</i> flag for country is selected. See Setting Up the Country Table (WCTY). SCF validation: If the <i>Require postal?</i> flag for the country is selected, the system validates that the state you enter is assigned to the SCF associated with the postal code. See Working with SCF Codes (WSCF) for background. <i>Alphanumeric, 2 positions; required or optional based on country.</i>
Ctry (Country)	The code for the country where the order is shipping. Country codes are defined in and validated against the Country table. The Default Country for Customer Address (B17) system control value, if any, defaults here; but you can override this value. <i>Alphanumeric, 3 positions; required.</i>

Field	Description
Delivery	A code to identify an address as a business or residence. This code is used to calculate shipping charges for shippers that use rate tables, such as UPS. Valid values are: • Business • Residence • No distinction between business and residence (not a valid delivery code for a UPS shipper) The system uses this logic to default a delivery code to a customer address on an order: • The system defaults the delivery code from the postal code on the address. • If there is no delivery code for the postal code on the address, the system defaults the delivery code from the Customer table. • If there is no delivery code in the Customer table, the system uses the Default Delivery Code for New Order Entry Customers (D13). <i>Required.</i>
Rent	Indicates whether to include the customer's name in lists that you rent. Valid values are: • selected = You can rent this customer's name. • unselected = You cannot rent this customer's name. The Default Rent Name (D11) setting defaults here, but you can override it.
	 Note: Not on the Change or Display Customer Ship-to screens.
Mail code	This code indicates when, and under what circumstances, you can send mail to this customer. Mail codes are defined in and validated against the Mail/Call Code table; see Working with Mail/Call Codes (WMCC) Not to be confused with the <i>Mail</i> flag. If you do not enter a mail code at the Create Customer Ship To screen, the system will default in the value from the Default Mail Name (D10) system control value.
	 Note: Not on the Change or Display Customer Ship-to screens.

Alphanumeric, 3 positions; optional.

Field	Description
Call code	This code indicates when, and under what circumstances, you can call the customer. Call codes are defined in and validated against the Mail/Call Code table; see Working with Mail/Call Codes (WMCC).

 Note:

Not on the Change or Display Customer Ship-to screens.

Country code	<i>Alphanumeric, 3 positions; optional.</i> The international telephone code associated with this country. For example, the country code for France is 33. You must enter this code plus the city code before the telephone number to place an international telephone call. <i>Numeric, 3 positions; display-only.</i>

Field	Description
Telephone numbers	The daytime, evening and third (fax or mobile) telephone numbers associated with this shipping address.  Note: The Third Phone Number Type (L53) system control value determines whether the third phone number is labeled the <i>Fax</i> or <i>Mobile</i> number. Phone number format: You can define a telephone number format to map to the phone numbers operators enter into the system. Telephone number formats are defined by arranging numbers and special characters such as hyphens and parenthesis in the same order and position as the numbers in a telephone number would display. When an operator enters a phone number, the system compares the number of numeric characters in the phone number with the telephone number formats you have defined. In order to match a format, the phone number must have the same number of numeric positions as a telephone number format. If the system cannot find a match, the phone number does not map to a telephone number format and displays as it was entered by the operator. Example: An operator enters a phone number containing 10 numbers: 5085550100. The telephone number format used in the United States to represent an area code, local exchange and local phone number is: (508) 555-0100. When an operator enters a phone number containing 10 numbers (as in the example), the phone number displays so that the first 3 positions are in parenthesis and a hyphen is between the sixth and seventh numbers, regardless of how the operator entered it into the system. If an operator enters a phone number containing 6 numbers, for example 5550100 and no format exists for 6 numbers, the phone number would display as it was entered. (5550100). See Setting Up the Country Table (WCTY). <i>Alphanumeric, 14 positions each field; optional.</i>
E-mail address	The customer's email address. See Email Address Validation for an overview of how the system verifies that your entry is formatted correctly. <i>Alphanumeric, 50 positions; optional.</i>

Screen Option	Procedure
Default Sold-To Customer information on the Create Customer Ship To screen	Select Default Sold To if you want the system to default sold-to customer information in the fields on this screen. Selecting this option defaults the following fields from the order header: • Name • Company • First line of address information • Apartment number • Postal code • City • State • Country • Delivery code (Business or Residence) • Rent flag • Day phone and extension • Evening phone and extension • Third (fax or mobile) phone and extension You can override this information.

Assigning an Order Shipping Address

Purpose: Use the Create Order Ship to Address Screen to specify a shipping address for the order that will be linked to the current order only; no secondary customer record is filed with this address to use on future orders.

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

Example: Here is an example of when you would define an order ship-to address for an order:

Customer: "...please ship the package to my hotel room, because I am on vacation...."

No history captured: When you enter an order ship-to address, the system does not capture mail, order, or item history because the recipient is not a good target for future mailings.

When you create an order ship-to address, the system:

- Attaches this address automatically to the current order only
- Ships the order to the new shipping address

Shipping restrictions: If you have already entered the order, and one or more items on the order are restricted from being shipped to the state or country of the ship-to address you have selected, you cannot attach the new address to the order; instead, a message indicates:

One or more items on the order line are restricted to new shipping country/state.

For more information: See [Entering Additional Item Information](#) for information on item/state restrictions.

Tax calculation: If the customer has a tax exemption at the state level, you need to clear the tax-related fields in order to prompt the system to recalculate the tax on the order based on the new shipping address. See [Working with Customer Tax Status](#) for an overview.

Ship-for-pickup order: If you use the [Order Orchestration Integration](#), you can use the Create One Time Ship To Address screen to create a ship-for-pickup order (an order you ship to a designated store location, where the customer picks it up). See [Ship-for-Pickup Orders](#) for an overview.

Oracle Retail Customer Engagement customer integration: An one-time shipping address is not included in the information that Order Administration sends to Oracle Retail Customer Engagement when you use the Oracle Retail Customer Engagement customer integration. See the [Customer Engagement Customer Integration](#) for more information.

In this topic:

- [Create One Time Ship To Address Screen](#)
- [Store Location Screen](#)

Create One Time Ship To Address Screen

How to display this screen: Select One Time Ship To at the [Work with Order Screen](#) or the [Work with Order/Recap Screen](#). You advance to the Change One Time Ship To Address screen instead if there is already an order ship-to address for the order; this screen includes all the same fields as the Create screen, and the attributes of each field are the same.

About this screen: The first fields at the top of this screen include information pertaining to the current order. Notice that no customer number is assigned to the order ship-to address record. This limitation is in place because the only purpose of this address is to direct the order to the correct destination.

The [Country](#) might default from the System Control table. Otherwise, the fields on this screen are blank, so you can enter the shipping address for the order.

Creating a ship-for-pickup order: If the [Name in OROB for Point of Sale \(L09\)](#) system control value specifies a system name, then the Store option is available at this screen. Select this option to advance to the [Store Location Screen](#), where you can select the store where the customer wants to pick up a ship-for-pickup order. The store description and address then default to the Create One Time Ship To Address screen.



Note:

The Store option is not available in order maintenance.

Field	Description
Order#	A unique number assigned by the system to identify an order. Every order on the system is assigned an order number. This number is used in Order Inquiry to review information for the order. This number is also used throughout the system to access information on an order. You cannot update this number. <i>Numeric, 8 positions; display-only, assigned by the system.</i>
Ship-to number (unlabeled field)	A hyphen (-) separates this field from the Order# field. The system assigns a sequential ship-to number to every shipping address on an order, even if the shipping address and the sold-to address are the same. The first ship-to address is assigned the number 1. You cannot update this number. <i>Numeric, 3 positions; display-only, assigned by the system.</i>

Field	Description
Sold-to name	The name or company name of the customer placing the order. <i>Alphanumeric, 41 positions; display-only.</i>
Store#	The store number and description of the store location selected for a ship-for-pickup order, if selected at the Store Location Screen . In this case, the description also defaults to the <i>Company</i> field. If the store description exceeds 35 positions, it is truncated. <i>Store number: alphanumeric, 10 positions; display-only.</i> <i>Store description: alphanumeric, 35 positions; display-only.</i>
Name	Five fields are available for you to enter the customer's full name: Prefix A title that belongs before the customer's name, such as "Mrs." or "Dr." <i>Alphanumeric, 3 positions; optional.</i> First Name The customer's first name. <i>Alphanumeric, 15 positions; optional.</i> Initial The initial of the customer's middle name. <i>Alphanumeric, 1 position; optional.</i> Last Name The customer's last name. <i>Alphanumeric, 25 positions; required if Company has not been entered.</i> Suffix An addition to the customer's full name, such as "M.D.", "Fr.", or "III." <i>Alphanumeric, 3 positions; optional.</i>
Company	The name of the company to receive the shipment. <i>Alphanumeric, 30 positions; required if Last name has not been entered.</i>
Address	Four address fields are available: Address line #1 The customer's street address. Enter P.O. Box and the box number if the customer's shipping address is a post office box. For example, enter P.O. Box 9999 in the <i>Street</i> field to indicate delivery to a post office box instead of a home or company address. <i>Alphanumeric, 32 positions; required.</i> Address lines #2-#4 (unlabeled fields under initial <i>Address</i> field): Additional address fields for international or business addresses. <i>Alphanumeric, 32 positions; optional.</i>
Apt/Suite (Apartment/Suite)	The customer's apartment, suite, rural route, or floor number. <i>Alphanumeric, 10 positions; optional.</i>

Field	Description
Postal code	The postal or zip code for the shipping address. Required? A postal code is required only if the <i>Require postal code?</i> flag for the country is selected; see Setting Up the Country Table (WCTY). Default city and state? If the system control value Use Zip/City/State Defaulting? (B13) is selected, you can enter just the postal code to have the system default the associated city and state. Postal code validation: If a postal code is required, it is validated against the Zip/City/State (Postal Code) table; see Setting Up the Zip/City/State (Postal Code) Table (WZIP). Tax rates: The Postal Code table includes valid postal code/city/state combinations, and may also contain tax rates. You can purchase a listing of the valid combinations from your post office or you can enter each postal code/city/state combination manually. SCF/ship via validation: If you enter a postal code and the <i>Perform ship via edit?</i> flag for the country is selected, the system validates the SCF/ship via combination against the SCF Ship Via table when you complete the order; see Working with SCF/Ship Via Values (WSHV). <i>Alphanumeric, 10 positions; required or optional based on country.</i>
City	The city where the customer receives mail the shipment. <i>Alphanumeric, 25 positions; required.</i>
State	The state or province where you are shipping the order. Defined where? State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Required? A state is required only if the <i>Require state?</i> flag for country is selected. See Setting Up the Country Table (WCTY). SCF validation: If the <i>Require postal?</i> flag for the country is selected, the system validates that the state you enter is assigned to the SCF associated with the postal code. See Working with SCF Codes (WSCF) for background. <i>Alphanumeric, 2 positions; required or optional based on country.</i>
Country	The code for the customer's country. Country codes are defined in and validated against the Country table. The country defaults from the Default Country for Customer Address (B17) or from your entry at the Default Values for Orders screen. <i>Alphanumeric, 3 positions; required.</i>
Delivery	Identifies a business (commercial) or residential address. Used when you ship an order by a carrier that uses business or consumer rate tables (such as UPS). • B =Business rate table will be used to determine shipping charges. • R =Residential rate table will be used to determine shipping charges. <i>Alphanumeric, 1 position; optional.</i>

Field	Description
Email address	The email address associated with the ship-to mailing address. The email address is upper and lower case. Fraud checking: The order goes on ES hold if this email address matches an email address in the Miscellaneous Fraud table; see Working with Miscellaneous Frauds (WMFF). <i>Alphanumeric, 50 positions; optional.</i>
Phone	The phone number for the one-time shipping address. Telephone number format: You can define a telephone number format to map to the phone numbers operators enter into the system. Telephone number formats are defined by arranging numbers and special characters such as hyphens and parenthesis in the same order and position as the numbers in a phone number would display. When an operator enters a phone number, the system compares the number of numeric characters in the phone number with the telephone number formats you have defined. In order to match a format, the phone number must have the same number of numeric positions as a telephone number format. If the system cannot find a match, the phone number does not map to a telephone number format and displays as it was entered by the operator. See Work with Telephone Number Format Screen form more information. <i>Alphanumeric, 14 positions; optional.</i>

Screen Option	Procedure
Select the store where the customer wants to pick up a ship-for-pickup order	Select Store to advance to the Store Location Screen. This option is available only if the Name in OROB for Point of Sale (L09) system control value specifies a system name. When you select a store on the Store Location Screen, the system defaults the store description and address to the Create One Time Ship To Address screen.

 Note:

The Store option is not available in order maintenance.

Store Location Screen

Purpose: Use this screen to select the store location where the customer wants to pick up a ship-for-pickup order. Only store locations set up through [Work with Store Cross Reference \(WSCR\)](#) and flagged as *Ship for pickup* are available at this screen. See [Ship-for-Pickup Orders](#) for an overview.

How to display this screen: Select the Store option at the [Create One Time Ship To Address Screen](#). The Store option is available if the Name in OROB for Point of Sale (L09) system control value specifies a system name.

**Note:**

The Store option is not available if there is an Order Orchestration record associated with the order (indicating that the order is a delivery or retail pickup order received from Order Orchestration, or a brokered backorder sent to Order Orchestration). See the [Order Orchestration Integration](#) for an overview.

Field	Description
Store code	The store code from the Store Cross Reference record. <i>Alphanumeric, 10 positions; display-only.</i>
Postal code	The postal code where the store is located. <i>Alphanumeric, 10 positions; display-only.</i>
City	The city where the store is located. If the city exceeds 35 positions, it is truncated. <i>Alphanumeric, 35 positions; display-only.</i>
State	The state or province where the store is located. <i>Alphanumeric, 2 positions; display-only.</i>
Store name	The description of the store. If the description exceeds 30 positions, it is truncated. <i>Alphanumeric, 30 positions; display-only.</i>

Selecting a store location: When you select a store location, the following information from the Store Cross Reference record defaults to the [Create One Time Ship To Address Screen](#):

- Store #: assigned to the Order Ship To for the order
- Description: Company name field (truncated to 30 positions)
- Address lines 1-4, city, state, postal code, and country: corresponding fields for the one-time shipping address

**Note:**

In order to create a ship-for-pickup order to send to Order Orchestration, you need to select the store at this screen. If you simply enter the name and address of the store at the [Create One Time Ship To Address Screen](#), the system does not treat the order as a ship-for-pickup order or send the order information to Order Orchestration.

Changing to or from a store location for a ship-for-pickup order:

- *Changing the information from the Store Cross Reference record:* Once you have selected a store location for a ship-for-pickup order, it is important not to change the name and address to one that differs from the store location's shipping address.
- *Selecting a store after entering a name and address:* If you select a store location after initially entering a one-time ship-to address for the order, the system flags the order as a ship-for-pickup order and defaults the available address fields from the Store Cross Reference record; however, if you previously entered a name or apartment/suite that did not default from the Store Cross Reference record, this information remains. Things to note:

- The fields you cannot define for the Store Cross Reference record are the name fields (prefix, first name, middle initial, last name, suffix); the apartment or suite; and the email address.
- If you leave any of the address lines blank for the Store Cross Reference record, the information you entered previously is not replaced when you select the store.
- *Changing to a different store:* After selecting a store location, you can change the order to ship to a different store location by selecting the Store option again. The description and address of the new store location replaces the existing shipping address.
- *Removing a store:* You can select Delete on the [Create One Time Ship To Address Screen](#) during order entry to remove the store location from the order. In this situation, the system no longer considers the order a ship-for-pickup order and changes the ship-to address on the order to the sold to address.

For more information: See [Ship-for-Pickup Orders](#) for background.

Adding a Recipient Order in Order Entry

Purpose: Use this screen to send all or part of the order to another address.

In this topic:

- [About Gift Orders](#)
 - [Alternating Display of Sold-to/Recipient Addresses](#)
- [Recipient Entry Methods](#)
- [Select Customer Sold To Pop-up Window](#)
- [Scan Types](#)
 - [Alphabetic Scan](#)
 - [Numeric Scan](#)
 - [E-mail Address Scan](#)
- [Using the Scan Screen](#)
- [Copying the Sold To Customer Address](#)

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

The system assigns the first order an order number, you enter name, address, and item information, and then select Add Recipient to accept the current order and enter the next order.

Adding a ship-to suffix to the order number: When you enter the second order, the system views this as a recipient order, related to the initial order. The system assigns this order (and any subsequent recipient order) the same order number, but increments the shipping suffix by 1 for every additional recipient address on the order.

Adding a sold-to record: The system also assigns a sold to customer number to the person or company receiving each recipient order and creates a separate record for each recipient address in the Sold To Customer table. The system updates the recipient customer record with an R in the *Original mail type* field to indicate that the customer was added to the Customer Sold To table as a recipient. This code is used for historical purposes to trace how the customer was added to the system.

If the [Update Original Source Code for Recipient Customers \(F90\)](#) system control value is selected, the system writes the source code defined for the sold to customer to the *Original source* field for a recipient customer.

Recipient orders as separate orders: Although the buyer on the order (sold-to customer) and the order number are the same for a multi-recipient order, each recipient order is considered a separate order on the system. You must define name, address and item information for each order recipient, but define payment information only once.

Select Options to review the order totals across all recipients on the order. The Order Totals pop-up window summarizes the individual charges on each recipient order and displays balances for what the customer has purchased, paid and owes. See [Displaying More Options in Order Entry](#).

The system does not capture sales history for any of the recipients.

Switching from one recipient to another: As you work with the order, you can switch from one recipient to another through the Display Order Summary screen. At the Display Order Summary screen, you can change recipient order information, such as item information, before you process the order.

You can advance to the [Display Order Summary Screen](#) by selecting Summary on the [Work with Order Screen](#), [Work with Order Lines Screen \(Adding Items to the Order\)](#) or [Work with Order/Recap Screen](#). At the Order Summary screen you can:

- Review all of the items ordered for the current order plus any recipient orders. The Order Summary screen lists each item ordered for each shipping address so you can verify the items ordered.
- Accept the order information for the recipient you are currently working with and switch to another recipient so you can work with the order information for that recipient.
- Copy an item from a recipient to the recipient you are currently working with. When you copy an item, the system adds an order line to the current order ship to for each item copied.
- Review the order totals in the customer's currency.

Email address and opt-in/out setting: The email address and opt-in/out setting are associated with the customer who places the order. When you enter a new email address, the system adds an email address for the customer placing the order; similarly, if you display the [Select Customer Email Address Screen](#) by prompting on the email address, the screen displays email address information for the customer placing the order. To review or work with the recipient's email address or opt-in/out setting, you must advance to the [Expand Name/Address Screen](#).

 Note:

This option is not available for a store pickup order; see [Store Pickup Orders](#) for an overview.

Tax calculation: If the customer has a tax exemption at the state level, you need to clear the tax-related fields in order to prompt the system to recalculate the tax on the order based on the new shipping address. See [Working with Customer Tax Status](#) for an overview.

Oracle Retail Customer Engagement customer integration: When you use the Oracle Retail Customer Engagement customer integration, if you create a recipient customer in order entry, Order Administration sends the information about the recipient customer to Oracle Retail

Customer Engagement so that the customer records in the two systems are synchronized. See the [Customer Engagement Customer Integration](#) for more information.

About Gift Orders

Another type of recipient order is a gift order. You identify an order as a gift order by selecting the *Gift* field. You can then select Sold To/Recip to enter the address where the gift will be shipped. The gift recipient's address is entered on the same screen you use to enter the address for a recipient order.

If the gift recipient is not already a customer of your company, the system assigns a sold-to customer number to the recipient of the gift order, creates a separate sold-to customer record under this number and updates the original mail type field with an R (recipient) to track how the order was received on the system. This makes the gift recipient eligible for future mailings because the customer is already familiar with your product.

A gift order differs from a recipient order because:

- pricing information may not print on the pick slip, depending on your pick slip printing program
- a gift acknowledgment card prints for the customer who placed the order (sold-to customer) to confirm that the gift has been shipped

The system performs the same updates as with recipient orders.

The system does not capture sales history for the gift recipient.

Alternating Display of Sold-to/Recipient Addresses

Select Sold To/Recip at the [Work with Order Screen](#) to review or enter the buyers (sold-to) address or recipient's address. Notice that the addresses of the customer who placed the order (sold to customer) and the customer who will receive the order alternate each time you select Sold To/Recip.

Recipient Entry Methods

Purpose: You can enter a recipient order in two ways:

- Select Accept/Add Rcp on the [Work with Order Screen](#), [Work with Order/Recap Screen](#) or [Select Order Recipient Screen](#).
- Select Sold To/Recip on the [Work with Order Screen](#) if the recipient is a gift order.

Confirm Missing Recipient Window

This window opens if you select Accept/Add Rcp or Sold To/Recip to add a recipient and then select Accept/Add Rcp or Sold To/Recip again without entering a recipient address:

The system is looking for a recipient address. Select OK to override this message and use the sold to address or select Exit to enter a recipient address.

When you select Accept/Add Rcp or Sold To/Recip to add a recipient to the order, the system advances you to the [Work with Order Screen](#). On this screen, the customer address lines default in blank. Here you can:

- Enter in the recipient's address information. The system advances you to the Display Duplicate Sold To window if the system finds a match to the address you entered; otherwise the system creates a new sold to customer record for the address.
- Click on the arrow in the name or company name fields to advance to the [Select Customer Sold To Pop-up Window](#) where you can scan for an existing customer.

- Select Cancel to default the sold to customer's name and address information in the recipient's address lines. You would use this option if you are shipping to the same address but to a different person. For example, a daughter is ordering a gift for her mother and they live in the same house.

Select Customer Sold To Pop-up Window

Purpose: Use this window to scan for an existing customer to update the recipient address lines.

A message indicates when you select an existing customer address to default into the recipient address fields on the Work with Order Screen:

Customer (46) has been updated with changes!

This message indicates that the order has been updated with the recipient address.

Oracle Retail Customer Engagement customer integration: If the [ORCE Customer Integration \(L37\)](#) system control value is set to INTERACT, you advance instead to the [Customer Scan Screen](#). See the [Customer Engagement Customer Integration](#) for an overview.

How to display this screen: Prompt on the *First name, Middle initial, Last name* or *Company* fields of the recipient address on the [Work with Order Screen](#).

Field	Description
Match code	A code the system assembles in the format you define through the Match Code function. The match code contains elements of the customer's name and address. The system assigns a match code to every customer on the system to identify duplicate customers and to detect fraudulent addresses. Enter a full or partial match code to advance to the Scan Customer by Match Code screen. <i>Alphanumeric, 15 positions; optional.</i>
Postal code	A postal delivery area. See Setting Up the Zip/City/State (Postal Code) Table (WZIP). Enter a full or partial code to advance to the Scan Sold To by Postal Code/Company screen. This screen lists all customers by postal code in ascending (lowest to highest) numeric sequence, beginning with the code you entered. If you enter a postal code, last name, and first name, you advance to the Scan Customer Sold To by Postal Code screen, which lists all customers alphabetically beginning with the postal code you entered. <i>Alphanumeric, 10 positions; optional.</i>
Last name	The sold to customer's last name. Enter a full or partial name to advance to a Scan Cust Sold To By Last Name screen, which lists all customers alphabetically beginning with the name you entered. You can also include a full or partial first name along with a full (not partial) last name to restrict the scan further. <i>Numeric, 25 positions; optional.</i>

Field	Description
First name	The sold-to customer's first name. Enter the last name, first name, and postal code to advance to the Scan Customer Sold To by Postal Code screen, which lists all customers alphabetically beginning with the postal code you entered. You can also enter just the full (not partial) last name and full or partial first name to advance to the Scan Cust Sold To By Last Name screen.  Note: <i>First name</i> must be used in conjunction with <i>Postal code</i>, <i>Last name</i> or with just <i>Last name</i> for scanning. You cannot scan on first name alone. See Scan Types.
Company	<i>Alphanumeric, 25 positions; optional.</i> The sold to customer's company name. Enter a full or partial company name to advance to the Scan Customer by Company Name screen. <i>Alphanumeric, 30 positions; optional.</i>
Telephone #	The daytime, evening or third (fax or mobile) telephone number of the sold to customer. The Third Phone Number Type (L53) system control value determines whether the third phone number is labeled the <i>Fax</i> or <i>Mobile</i> number. You can define a telephone number format for each country to map to the phone numbers operators enter into the system. See Setting Up the Country Table (WCTY).  Note: Your entry should include any formatting specified by the telephone number format for the country; for example, if the telephone number format for the United States is (111) 111-111, your entry should include the parentheses and hyphen. Enter a full or partial phone number to advance to the Scan Customer by Phone Number screen. <i>Alphanumeric, 14 positions; optional.</i>

Field	Description
Alt cust # (Alternate customer number)	An additional number to identify the sold to customer on the system. This can be a customer number from another system. Enter a full or partial alternate customer number to advance to the Scan Customer by Alternate Customer Number screen. Alternate Customer Number Label Description The field label name that is on this screen is based on the name you enter in the Alternate Customer Number Label Description (H95) system control value; if you do not enter a name in this system control value, the field label is <i>Alt cust</i>. Example: If you enter the field label name MEMBER# in the system control value, the field label name that is on this screen is <i>MEMBER#</i> instead of <i>Alt cust #</i>. <i>Alphanumeric, 15 positions; optional.</i>
E-mail Address	The customer's email address. Not case sensitive; an email address of abc@EXAMPLE.com matches an entry of ABC@EXAMPLE.COM, and vice versa. <i>Alphanumeric, 30 positions; optional.</i>
Customer (Sold to customer number)	A number assigned by the system to identify the customer. Enter a valid customer number in this field to default the address information to the recipient address fields on the Work with Order Screen. <i>Alphanumeric, 9 positions; optional.</i>

Scan Types

Purpose: Enter any combination of customer information in the scan fields. You advance to a scan screen that lists the customers who closely match the information you entered. Each scan screen (except the Scan Customer by Phone Number screen) includes the customer number, street address, city, state and postal code.

The types of scans that are available from the Select Customer Sold To pop-up window are:

- Match Code
- Postal Code/Last Name
- Postal Code/Last Name/First Name
- Postal Code/Company Name
- Last Name
- Company Name
- Phone Number
- Alternate Customer Number
- E-mail Address

How to scan? You can enter partial or full information into any of the scan fields. For example, you can enter M or Mae in the *Last name* field to located Mary Mae.

When you select OK on the [Select Customer Sold To Pop-up Window](#), the system advances you to a scan screen that lists customers who closely match the information you entered. The customers are listed alphabetically or numerically from the first record that matches the scan information until the end of the table.

Alphabetic Scan

Example: You receive this type of scan if you enter M in the *Last name* field:

MAE

MALLEY

MAX

Example: However, you receive this type of scan if you enter MAX in the *Last name* field:

MAX

MAXFIELD

MAXWELL

Numeric Scan

Example: You receive this type of scan if you enter a 0 in the *Postal code* field:

01007

01040

01128

Example: However, you receive this type of scan if you enter 017 in the *Postal code* field:

01701

01742

01746

E-mail Address Scan

This scan is not case sensitive; an email address of abc@example.com matches an entry of ABC@EXAMPLE.COM, and vice versa.

Using the Scan Screen

Purpose: There are several ways to select a customer for a recipient address from the scan screen, depending on whether the customer is listed.

If the customer is listed: Select the customer number to select the customer for the recipient address.

If you are not sure if this is the correct customer: Select Display for a customer number to review more information about the customer, such as telephone number. If the customer is correct, select OK the customer number.

If the customer is not listed: Continue your search by scrolling through customer records by selecting Next. More customer records are available if a + sign is indicated in the lower right of the screen. If you still cannot find the customer, return to the recipient address on the Work with Order screen and enter a new customer.

**Note:**

If you scan on the *Postal code*, *Last name* or *Company* fields on this screen and then select Create to create a new customer as an order recipient, the scan information you had entered defaults onto the related fields on the order. If your scan included a postal code, the related city, state and country also default.

Copying the Sold To Customer Address

Purpose: Select Copy Sold to default the sold to customer's address into the recipient address fields.

Copying the sold to customer address into the recipient address fields is helpful if the recipient customer has an address similar to the sold to customer's address. For example, if a daughter is ordering a gift for her mother and they live at the same address, you can select Copy Sold to default the sold to address into the recipient address fields and then override the *Name* field to enter the recipient's name.

If you scan for an existing customer by clicking on the arrow in the *First name*, *Middle name*, *Last name* or *Company name* fields, select a customer to default to the recipient address fields and then select Copy Sold to copy the sold to customer address, an error message indicates:

WARNING: Customer 26 is about to be changed.

If you then select OK, the system overrides the address for the customer you selected from the Select Customer Scan screens with the address of the sold to customer. If you do not want the system to override the selected customer with the sold to customer address, you must select Exit.

The system overrides this address information when you select an existing customer for the recipient address and then select Copy Sold to default the sold to customer in the recipient address fields:

- first name, middle initial and last name
- company name
- street address
- apartment/suite number
- address lines 1, 2 and 3
- postal code
- city
- state
- country
- day/business phone number
- evening/home phone number
- third (fax or mobile) phone number

Entering a Recipient Customer: You can enter the recipient's address information in the address fields on the Work with Order Screen for the recipient order.

You advance to the [Work with Order Screen](#) for a recipient order by:

- Selecting Sold To/Recip to enter the gift recipient's address, or

- Selecting Accept/Add Rcp to enter a recipient order shipping to a different address

How to complete this screen: To complete the recipient address information at the [Work with Order Screen](#), you have several options. You can:

- Enter the recipient's information in the address fields.
- If the recipient customer has an address similar to the sold-to customer's address (for example, a daughter is ordering a gift for her mother and they live at the same address), you can select Copy Sold to default the sold-to customer's address into the recipient address fields. See [Copying the Sold To Customer Address](#).
- If the recipient customer is an existing customer, you can click on the arrow in the recipient address fields to select the customer from one of the [Select Customer Sold To Pop-up Window](#).

Select OK after you enter the recipient's address information.

The system validates your entries and highlights any fields you need to correct. Correct any fields and select OK again.

The system verifies that the ship via (carrier) used on the previous order is still valid for the recipient address.

You can change any order information for a recipient order. For example, you can select a different shipping service. Any other recipient orders are not updated.

For a multi-recipient order (entering an order for the customer and a friend), the updates you make affect only the current recipient order. Additionally, you update the recipient customer when you update any of the customer-specific fields on the recipient screen.

**Note:**

If you have already entered the order, and one or more items on the order are restricted from being shipped to the state or country of the ship to address you have selected, you cannot attach the new address to the order and a message will display when you select OK:

One or more items on the order line are restricted to the new Shipping country/state.

See [Entering Additional Item Information](#), for information on item/state restrictions.

Screen Option	Procedure
Display the address of the buyer (Sold To Customer) or the recipient (Ship To Customer)	Select Sold To/Recipient.
Select an existing customer to default to the recipient address fields.	Click on the arrow in the recipient address field. See Select Customer Sold To Pop-up Window .
Enter or confirm the billing address	Select Bill To. See Assigning a Billing Address in Order Entry .

Screen Option	Procedure
Enter or confirm the shipping address kept on file for the customer	Select Customer Ship To. See Using a Permanent Shipping Address in Order Entry .
 Note: You cannot select Customer Ship To and select a permanent shipping address for the order if you entered an address for a gift recipient (with Sold To/Recipient) or you are sending part of the order to another recipient address (with Add Recipient); otherwise, the system issues a message:	
	A permanent ship to cannot be assigned - recipient present.
Enter the items for the order	Select Work w/detail. See Entering Orders .
Accept, validate and process the new order	Select Accept Order. See Entering Orders .
Reject (cancel) the new order	Select Reject Order. See Entering Orders .
Enter payment information for the order	Select Payments. See Entering Orders .
Enter a credit or add a miscellaneous charge to the order	Select Charges. See Adding Miscellaneous Charges or Credits in Order Entry .
Review the totals for the current order plus any other related (recipient) orders	Select Summary. See Displaying More Options in Order Entry .
Enter or verify the complete address	Select Expand Address. See Expanding the Address in Order Entry .
Enter a recipient address	Select Add Recipient.
Copy the sold to customer's information to the recipient address lines.	Select Copy Sold. See Copying the Sold To Customer Address .
Enter or change additional order information regarding shipping and delivery	Select Properties. See Defining Order Properties .
Enter messages for the order, such as a birthday message or delivery instructions	Select Messages. See Adding Order Messages .

Assigning a Billing Address in Order Entry

Purpose: Use this option to enter or select a billing address for the current order being paid on-account.

Here are some examples where you might use a billing account:

- when the customer is placing an order for a company and wants to bill the corporate headquarters for the order, or
- when the customer is placing an order and charging it to his/her parent's credit card, or
- when the customer wants to pay on-account.



Note:

The value in the [Create/Assign Bill To Customers in Order Entry \(A76\)](#) system control value controls whether you can set up a billing account for a customer during Order Entry or only through the Customer table.

In this topic:

- [Related System Control Values](#)
- [Select Customer Bill To Window](#)
- [Create Customer Bill To Screen](#)
- [Scan Customer Bill to By Match Code Screen \(Using an Existing Billing Account\)](#)
- [Display Customer Bill To Screen](#)
- [Change Customer Bill To Screen \(Selecting, Changing, or Excluding a Billing Account\)](#)

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

A customer can have only one billing account; however, more than one customer can use the same billing account.

You can set up a billing account for a customer by entering the account number in the *Bill to* field in the Customer table. This is useful if you want your customers to fill out an application for an account and select a credit limit for the customer instead of opening a billing account for the customer during Order Entry. This helps you control your credit risk.

Related System Control Values

These system control values control how the system creates new bill-to customers:

- [Create/Assign Bill To Customers in Order Entry \(A76\)](#) controls whether the system allows you to assign a bill-to customer to a sold-to customer in Order Entry. In this case, the system uses the sold-to customer information for the new bill-to customer.
- [Allow Order for New Bill-to Without Order Hold \(D84\)](#) controls whether orders associated with a new bill-to customer, created automatically by the system in Order Entry, goes on UB (unreferenced bill-to) hold.

Select Customer Bill To Window

How to display this window: Select Bill To at the [Work with Order Screen](#) when entering an order for a customer who is not already assigned to a bill-to.

At this window, you can enter the number of the billing account for this customer or enter information in any of the scan fields to locate the desired account. Otherwise, you can select Create here to set up a new billing account for the customer.

Field	Description
Order#	A unique number to identify an order. <i>Numeric, 8 positions; display-only, assigned by the system.</i>
Customer name (Unlabeled field to the right of the Order# field)	The customer last name, first name, and initial or the name of the company placing the order. <i>Alphanumeric, 41 positions; display-only.</i>
Account# (Billing account number)	A number to identify the billing account. Enter a billing account number here to attach an existing billing address to the current order. <i>Numeric, 7 positions; display-only, assigned by the system.</i>
Match code	A code, made up of parts of the customer's name and address, which is used to identify duplicate customers. See Setting Up Match Codes (MMCH) . <i>Alphanumeric, 15 positions; optional.</i>
Postal code	A code for a postal delivery area. You can enter a postal code and last name or a postal code and company name to narrow down your search for a billing account. <i>Alphanumeric, 10 positions; optional.</i>
Last name	The last name used on the billing account. <i>Alphanumeric, 25 positions; optional.</i>
Company name	The company name used on the billing account. <i>Alphanumeric, 30 positions; optional.</i>
Telephone #	The daytime, evening or third (fax or mobile) phone number for the billing account. <i>Phone #: Alphanumeric, 14 positions; optional.</i> <i>Type: Alphanumeric, 1 position; optional.</i>

Screen Option	Procedure
Create a new billing account to use for this order	Select Create to advance to the Create Customer Bill To Screen .

Create Customer Bill To Screen

Purpose: Use this screen to create a billing account for the current order. Any invoices for this order will be sent to this address.

How to display this screen: Select Create at the [Select Customer Bill To Window](#).

Field	Description
Order#	A number assigned by the system to identify an order. <i>Numeric, 8 positions; display-only, assigned by the system.</i>
Customer name (unlabeled field to the right of the Order# field)	The last name, first name and initial or the company name of the buyer (customer who is placing the order). <i>Alphanumeric, 41 positions; display-only.</i>

Field	Description
Account# (Billing account number)	A number assigned by the system to identify a billing account. The system assigns a billing account number to every customer placing an order on credit. <i>Numeric, 7 positions; display-only, assigned by the system.</i>
Name	The full name of the customer on the billing account. This may include a prefix (such as Mr. or Dr.), first name, initial, last name, and suffix (such as Jr. or III). <i>Alphanumeric, 47 positions; name or company name are required.</i>
Company	The company name on the billing account. <i>Alphanumeric, 30 positions; name or company name are required.</i>
Address	The full address for the billing account. The first address line is for the street address. This is the primary delivery address. Enter P.O. Box and the box number here if the address represents a post office box. Address lines 2-4 are for additional address information or international addresses. <i>Alphanumeric, 32 positions each line; address line #1 is required, address lines 2-4 are optional.</i>
Apt/Suite (Apartment/Suite)	The apartment, suite, rural route or floor number for this billing address. To enter an apartment or suite address: 1. Enter APT to indicate an apartment or STE to indicate a suite. 2. Insert a space. 3. Enter the number of the apartment or suite, such as: APT 4 or STE 1164A. <i>Alphanumeric, 10 positions; optional.</i>
Postal code	The postal or zip code for the billing address. Required? A postal code is required only if the <i>Require postal code?</i> flag for the country is selected; see Setting Up the Country Table (WCTY). Postal code validation: If a postal code is required, it is validated against the Zip/City/State (Postal Code) table; see Setting Up the Zip/City/State (Postal Code) Table (WZIP). <i>Alphanumeric, 10 positions; required or optional based on country.</i>
City	The city associated with this billing address. <i>Alphanumeric, 25 positions; required.</i>
St (State)	The state or province of the billing address. Defined where? State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Required? A state is required only if the <i>Require state?</i> flag for country is selected. See Setting Up the Country Table (WCTY). SCF validation: If the <i>Require postal?</i> flag for the country is selected, the system validates that the state you enter is assigned to the SCF associated with the postal code. See Working with SCF Codes (WSCF) for background. <i>Alphanumeric, 2 positions; required or optional based on country.</i>

Field	Description
Ctry (Country)	The code for the country associated with this billing address. Country codes are defined in and validated against the Country table. A country code may default here from the Default Values for Orders screen or the System Control table; however, you can override this code. <i>Alphanumeric, 3 positions; required.</i>
Delivery	A code to identify this address as a commercial or residential address. This code is used for calculating shipping charges for shippers who use different shipping rate tables when shipping to a business or home. Valid values are: • Business • Residential • No Distinction (This is not a valid value for a UPS shipper). <i>Required.</i>
Email address	The bill-to customer's email address. See Email Address Validation for information on how the system verifies that your entry is formatted correctly. <i>Alphanumeric, 50 positions; optional.</i>
OptIn	Indicates the preferred method of correspondence for the bill-to email address. Valid values are: • All E-Mail = Email is the preferred method of correspondence. • Order E-Mail Only = Use email for order-related correspondence only; generate a document for other correspondence. • No E-Mail = Do not use email for any correspondence; generate a document instead. • Do Not Ask = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified. Defaults from the Default Opt In/Opt Out Flag (G97) system control value, but you can override it.

 Note:

The above value uses the letter O, not the number 0 (zero).

Required.

Field	Description
Telephone country code	A code that determines how telephone numbers display for this country. The system reformats the telephone number for the screen based on this code. The telephone country code is important because the format for telephone numbers differs between countries. The country code may also be referred to as the country prefix. For example, the country code for France is 33. You must enter the country code (and, optionally, the city code) before the local number to make an international call. <i>Numeric, 3 positions; display-only.</i>
Telephone numbers	Three different fields are available for you to enter the daytime (business), evening, and third (fax or mobile) phone numbers for this billing address. NOTE: The Third Phone Number Type (L53) system control value determines whether the third phone number is labeled the <i>Fax</i> or <i>Mbl</i> (mobile) number. Phone number format: You can define a telephone number format to map to the phone numbers operators enter into the system. Telephone number formats are defined by arranging numbers and special characters such as hyphens and parenthesis in the same order and position as the numbers in a phone number would display. When an operator enters a phone number, the system compares the number of numeric characters in the phone number with the telephone number formats you have defined. In order to match a format, the phone number must have the same number of numeric positions as a telephone number format. If the system cannot find a match, the phone number does not map to a telephone number format and displays as it was entered by the operator. Example: An operator enters a phone number containing 10 numbers: 5085550100. The telephone number format used in the United States to represent an area code, local exchange and local phone number is: (508) 555-0100 When an operator enters a phone number containing 10 numbers (as in the example), the phone number displays so that the first 3 positions are in parenthesis and a hyphen is between the sixth and seventh numbers, regardless of how the operator entered it into the system. If an operator enters a phone number containing 6 numbers, for example 5550100 and no format exists for 6 numbers, the phone number would display as it was entered (5550100). See Setting Up the Country Table (WCTY). <i>Alphanumeric, 14 positions each telephone number; optional.</i>

Screen Option	Procedure
Use the name and address of the buyer as the billing address	Select Default Sold To, then select OK.

Scan Customer Bill to By Match Code Screen (Using an Existing Billing Account)

Purpose: This window displays fields for you to enter the number of the billing account you want to use on the order or for you to search for a billing account by using any of the scan fields.

Scan types: You can locate an existing billing account by using the scan fields. Simply enter information in any of the scan fields to display a scan screen that lists billing accounts that match your entries.

Several scans are available, such as scan by...

- Match code
- Postal code only
- Postal code and last name
- Postal code and company name
- Last name only
- Company name only
- Telephone number

Scanning instructions: You can enter all or some information into any of the scan fields. For example, you can enter J or JONES in the *Last name* field to locate the billing account set up for Jones Plumbing Supply.

When you enter information in the scan fields, you advance to a scan screen that lists the billing accounts that closely match the information entered. The billing accounts are listed alphabetically or numerically from the first record that matches your entries until the end of the table.

How to display this screen: Enter information in the *Match code* field.

Screen Option	Procedure
Select a billing account to use for this order	Select a billing account. See Change Customer Bill To Screen (Selecting, Changing, or Excluding a Billing Account) .
Review the name and address on the billing account to verify it's the account you want to use	Select Display for a billing account to advance to the Display Customer Bill To Screen .
Create a billing account for this order	Select Create to advance to the Create Customer Bill To Screen .

Display Customer Bill To Screen

Purpose: Use this screen to verify the name and address on a billing account before you select the billing account for the current order.

How to display this screen: Select Display for a billing account listed on a scan screen.

Field	Description
Account # (Billing account number)	A number to identify the billing account. <i>Numeric, 7 positions; display-only, assigned by the system.fff</i>
Name	The prefix, first name, initial, and last name of the person set up on the billing account. <i>Alphanumeric, 41 positions; display-only.</i>

Field	Description
Company	The name of the company associated with the billing account. <i>Alphanumeric, 30 positions; display-only.</i>
Address	The full address for the billing account. The first address line is for the street address. This is the primary delivery address or where P.O. box information displays. Address lines 2-4 are for additional address information or international addresses. <i>Alphanumeric, 32 positions each line; display-only.</i>
Apt/Suite (Apartment/Suite)	The apartment, suite, rural route or floor number for this billing address. <i>Alphanumeric, 10 positions; display-only.</i>
Postal code	The postal code or zip code for this billing address. This code represents a delivery area. <i>Alphanumeric, 10 positions; display-only.</i>
City	The city associated with this billing address. <i>Alphanumeric, 25 positions; display-only.</i>
St (State)	The code for the state or province associated with this billing address. <i>Alphanumeric, 2 positions; display-only.</i>
Ctry (Country)	The code for the country associated with this billing address. Country codes are defined in and validated against the Country table. <i>Alphanumeric, 3 positions; display-only.</i>
Delivery	A code to identify this address as a commercial or residential address. This code is used for calculating shipping charges for shippers who use different shipping rate tables when shipping to a business or home. Valid values are: • Business • Residential • No distinction (not valid for UPS shippers). <i>Display-only.</i>
Email address	The bill-to customer's email address. See Email Address Validation for information on how the system verifies that your entry is formatted correctly. <i>Alphanumeric, 50 positions; display-only.</i>

Field	Description
OptIn	Indicates the preferred method of correspondence for the bill-to email address. Valid values are: • O1 (All) = Email is the preferred method of correspondence. • O2 (Order) = Use email for order-related correspondence only; generate a document for other correspondence. • O3 (None) = Do not use email for any correspondence; generate a document instead. • O4 (Don't Ask) = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified. <i>Display-only.</i>
Telephone (Telephone country code)	A code that determines how telephone numbers display for this country. The system reformats the telephone number for the screen so you can easily contact the customer. The telephone country code is important because the format for telephone numbers differs between countries. The country code may also be referred to as the country prefix. For example, the country code for France is 33. You must enter the country code (and, optionally, the city code) before the local number to make an international call. <i>Numeric, 3 positions; display-only.</i>
Telephone numbers	The day, evening and third (fax or mobile) phone numbers defined for this customer. NOTE: The Third Phone Number Type (L53) system control value determines whether the third phone number is labeled the <i>Fax</i> or <i>Mobile</i> number. You can define a telephone number format to map to the phone numbers operators enter into the system. <i>Alphanumeric, 14 positions each telephone number; display-only.</i>

Change Customer Bill To Screen (Selecting, Changing, or Excluding a Billing Account)

Purpose: Use this option to:

- select a billing account for the current order, or
- update billing information, or
- remove the billing account from the current order

How to display this screen: Enter a billing account number in the *Account#* field on the [Select Customer Bill To Window](#) or select a billing account from a scan screen.

To select: Select OK at this screen to use this billing account for the current order. The billing account is used automatically for the order.

If it is not the correct account or if the current order will not be purchased on-account, you must use the option to exclude the billing account.

To change: You can update the billing address as needed by entering over any information on the [Change Customer Bill To Screen \(Selecting, Changing, or Excluding a Billing Account\)](#). The system updates the Bill To table automatically with these changes.

To exclude: Select Excl. from order at the [Change Customer Bill To Screen \(Selecting, Changing, or Excluding a Billing Account\)](#) to remove the billing account from the current order only. You may do so if the account is not the account you want to use or if the customer normally pays on-account, but will not do so on the current order.

Screen Option	Procedure
Remove the billing account from the current order	Select Exc. from order.

Defining Order Properties

Purpose: Use this screen to further define the current order or to advance to additional fields that are unavailable on the initial Order Entry screen.

The Order Ship-to Properties screen displays order-level defaults that you can override at the item level, if necessary. However, the values on this screen are used if you do not enter overrides at the item level.

The information you enter on this screen affects only the current order; you can set different order properties for any secondary orders (order ship-to's), except where noted in the field descriptions. Additionally, your entries on this screen do not update the customer record.

Work with Order Ship to Properties Screen

How to display this screen: Select Properties on the [Work with Order Screen](#).

Field	Description
Order #	A unique number assigned by the system to identify an order. <i>Numeric, 8 positions; display-only, assigned by the system.</i>
Ship-to number (Unlabeled field to the right of the order number)	A hyphen (-) separates this field from the <i>Order#</i> field. Indicates the number of shipping addresses for the order. The system assigns a sequential ship-to number to every order, even if the shipping address and the sold-to address are the same. The first ship-to address is assigned the number 1. <i>Numeric, 3 positions; display-only, assigned by the system.</i>
Alt Ord	The order number, if any, that was passed through the <i>Generic Order Interface (Order API)</i> and used to identify the order in an external system. In the case of a retail pickup or delivery order assigned through the Order Orchestration Integration , this is the order number in the system originating the order. The system assigns an Order Administration order number at the time it creates the order. <i>Alphanumeric, 35 positions; display-only.</i> For more information see the Order Administration Web Services Guide on https://support.oracle.com (ID 2953017.1).
Weight (Order ship to weight)	The total weight of the items (based on the value in the <i>Sell weight</i> field in the Item table). <i>Numeric, 7 positions with a 2-place decimal; display-only.</i>
Arrival date	The date when the customer wants to receive the order. The current date defaults, but you can override it and enter a future date. <i>Numeric, 6 positions (in user date format); optional.</i>

Field	Description
B/O priority (Backorder priority for reservation)	Determines the sequence in which orders with backordered items reserve first, where: • 0 =Lowest priority • 9 =Highest priority A value defaults to this field if a priority was entered in the B/O priority (Backorder priority) field for the source code; and the header-level value, in turn, defaults to the Priority field on the order detail line. Priority for Immediate Reservation Immediate Reservation runs during Order Entry and reserves inventory for orders as they are entered. The Evaluate Backorders program uses the backorder priority to determine which backordered items receive stock first. <i>Numeric, 1 position; optional.</i>
Quote Origin	Indicates whether the order originated from a pre-order quote. • Selected = The order originated from a pre-order quote. • Unselected = The order did not originate from a pre-order quote. See Entering Pre-Order Quotes for an overview and the required setup. <i>Display-only.</i>
Calculate freight	Indicates whether the system will calculate and add freight charges to the order. • Selected = Freight will be calculated. • Unselected = Freight will not be calculated; the freight method for the source is ignored. To change this setting for the order, use the <i>Calculate freight</i> field at the Work with Order Screen. <i>Display-only.</i>
Gift	Indicates whether this order is a gift order that will be shipped to a second party. If so, no pricing information prints on the pick slip and the buyer receives a gift acknowledgment card to confirm delivery of the gift. • Selected = The order is a gift order. • Unselected = The order is not a gift order.

Field	Description
Ship complete	Indicates whether all items on the order must ship together. When an order must be shipped complete The system: 1. Reserves available inventory for the order (reserving a partial quantity for an item whenever possible). 2. Backorders the remaining inventory for the order; the item's <i>Reserved</i> field is set to 0. 3. Reserves the remaining inventory as it is received on purchase orders; the system ensures that backordered items receive inventory before new orders. 4. Creates pre-generated picks for the order <i>when all items are available</i>; the warehouse can now pick and ship the order. 5. Holds any reserved items until all items can be fulfilled. When an order does not have to be shipped complete The system: 1. Reserves available inventory for the order (reserving a partial quantity for an item whenever possible). 2. Creates pre-generated picks for qualifying items; the warehouse can pick and ship these items; see Selecting Order Lines for Pick Slip Preparation. 3. Backorders the remaining inventory for the order; the item's <i>Reserved</i> field is set to 0. 4. Reserves the remaining inventory as it is received on purchase orders; the system ensures that backordered lines receive inventory before new orders. 5. Prints pick slips for the remaining items; the warehouse can now pick and ship these items; see Performing Pick Slip Generation. The system repeats Steps 4-5 for each backordered item until the order has been completely shipped. Valid values are: • Selected = Order must ship complete; available items will be held until each item is available and the entire order can ship together. • Unselected = Items can be shipped as they become available, or backordered and shipped at a later date. Defaults to selected if you have the Default Ship Complete Flag (E09) system control value selected; otherwise, this field will default to unselected.
Auto can B/O (Automatically cancel backorders)	Indicates whether the system will cancel any backordered items automatically for the first shipment on the order (during Confirmation, in which items are confirmed for shipment). • Selected = Items cannot be backordered • Unselected = Items can be backordered

Field	Description
Cancel date	The date when the order will be canceled if all lines have not shipped. The system will not reserve inventory one day prior to the order cancellation date, because the order would not reach the customer in time. Order Cancellation List Any items that have not shipped one day prior to the cancellation date appear on the Order Cancellation List. Customer Service uses this list of pending order cancellations to contact each customer and request more time. If this is not possible, Customer Service must cancel the order manually through Order Maintenance. <i>Numeric, 6 positions (in user date format); optional.</i>
Freight override	A flat freight fee for the order ship to. This fee will be used as the shipping charge on the current order, regardless of any system-calculated freight charges. If you change the freight override amount and a freight tax override amount exists, the system recalculates the Freight tax override amount on freight for the order ship to using the tax rate for the freight defined in the <i>OST Freight tax rate</i> field in the Order Ship To table.

 Note:

If a freight override exists, the system does not apply any additional freight, item charges, weight charges, or service charges to the order.

Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Freight tax override	The tax override amount on freight for the order ship to. Used only if a freight override amount is defined. If defined, the system does not calculate tax on freight.

 Note:

- You can define a tax override amount on freight only on orders received through the *Generic Order Interface (Order API)*; see the *freight_tax_amount* attribute in the *Inbound Order XML Message (CWORDERIN)*. For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).
- If you change the **Freight override** amount in order maintenance, the system uses the tax rate for the freight defined in the *OST Freight tax rate* field in the Order Ship To table to recalculate the freight tax override amount. The system does not update the freight tax rate based on the updated freight tax override amount.

The system stores the tax rate for the freight in the *OST Freight tax rate* field in the Order Ship To table; the system uses the freight tax rate during return and cancellation processing to determine the amount of tax on freight that should be returned or deducted during cancellation.

Numeric, 13 positions with a 2-place decimal; display-only.

Estimated freight

Your “best guess” of the freight charges on the current order. The true freight charge will be based on the actual weight of items on the order.

Actual (billing amount) freight method

You can enter an estimated freight charge when using the actual freight method (as designated by selecting Actual in the **Freight method** field of the source code). A freight method is a means of calculating shipping charges for an order. This is an order-level freight method that uses the total weight of all the items on the order to determine what the shipping charges will be.

The actual freight charge is determined during Confirmation or Billing by one of these methods:

- Weighing the package and using the system-calculated the freight charge
- Entering the freight charge manually

The estimated freight charge is not included in the order totals, so the *Frt* (freight) field will be blank (unless there is a freight override) until you determine the actual freight charge.

Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Tax code	This code determines whether the customer's purchases are taxed, and if so, how to calculate the tax. Defaults to the tax status from the Sold To Customer record for an existing customer, and defaults to unselected for a new customer. When you enter the customer's name and address, the system changes to the tax code to T if the customer is subject to tax. The system ignores the tax code if you use the an external tax system to calculate tax. The system uses these values to calculate tax on an order: • Tax Included in Price (E70) system control value and other system control values • Country table (see Setting Up the Country Table (WCTY)) • SCF table (see Working with SCF Codes (WSCF)) • Postal Code table (see Setting Up the Zip/City/State (Postal Code) Table (WZIP)) • Customer Sold To table and Customer Tax table (see Working with Customer Tax Status) • Item and SKU tables; Item Tax Exemption table and GST Tax Exemption Status table (see Working with GST Tax Exemption Status (MGTX) and Working with Item Tax Exemptions (WITX)) • Additional Charge Code table (see Establishing Additional Charge Codes (WADC)) The information that the system gathers for tax calculation purposes includes tax rates, calculation methods for the Canadian GST and PST taxes, and whether to tax freight and/or handling. You can set up a tax exemption as an default for a customer, or exemptions in particular states or provinces. Whenever you make any change to the shipping address on the order, you should clear the <i>Tax code</i> field and the <i>Tax identification</i> field. Clearing these fields allows the correct information to default into these fields based on the new destination address. See Working with Customer Tax Status for a discussion of how a customer's tax information defaults in order entry. Valid values are: • Standard Tax = Indicates that the customer is subject to all regular taxes. If the customer resides in Canada, the customer is subject to both GST and PST. • Non Taxable = Indicates that the customer's purchases are not taxed. The system will reset the field to T when you select OK. • Resale = Indicates that the customer is a reseller. A reseller is a person or company who purchases goods to sell to someone else. A reseller certificate number is required in the <i>Tax identification</i> field. The system will not calculate standard tax (in the <i>Tax</i> bucket) or VAT, if applicable, on the order. • Exempt = Indicates that the customer is considered tax-exempt. A tax-exempt certificate number is required in the <i>Tax identification</i> field. The system will not calculate standard tax (in the <i>Tax</i> bucket) or VAT, if applicable, on the order. • GST Only (Goods and Services Tax) = Indicates that the customer is a Canadian customer who is subject to the Goods and Services tax (GST) on purchases only. GST is a federal tax. The System Control table defines the default GST Rate (A90); however, an override GST rate may exist for the postal code or SCF.

Field	Description
	PST Only (Provincial Services Tax) = Indicates that the customer is a Canadian customer who is subject to the Provincial Services tax (PST) on purchases only. Tax Codes and their meaning Consult this table for a quick reference of each tax code, its tax status, and whether merchandise will be taxed on the order: Status Tax? Certificate #? Standard Tax yes no Non Taxable no no Resale no yes Exempt no yes GST yes no <i>Required.</i>
Tax identification (Reseller/Exempt certificate number)	The customer's tax identification number, typically the resale or exempt certificate number assigned to a customer who is identified as tax exempt (E) or as a reseller (R); otherwise, the tax identification number does not control taxability. Any combination of letters, numbers, or special characters is accepted. If a customer has a VAT exemption number, the tax code will default to Exempt and the words VAT EXEMPT will default in this field for any order subject to VAT. You cannot override a VAT exemption and make the order taxable. See Working with Customer Tax Status for a discussion of how tax information defaults in order entry. <i>Alphanumeric, 30 positions; required if customer is defined as tax exempt or as a reseller; otherwise, optional.</i>
Carrier #	The customer's carrier account number that will be billed when the order ships by the carrier. The customer will not receive a bill directly for the order shipping charges; the carrier delivery service will be billed for the shipment (and, in turn, bill your account). <i>Alphanumeric, 10 positions; optional.</i>
PO#	The customer's own purchase order number. For example, several departments within a company are requisitioning supplies. Each departmental manager creates a purchase order for these supplies, has it approved, and gives the purchase order to the office manager. The office manager places one order, with different ship-to addresses for each purchase order. Each purchase order represents a ship-to customer on the system, because, although the sold-to customer is the company placing the order, the recipient of each order differs by department (and purchase order number). The department manager may inquire into the status of his or her order by the purchase order number. <i>Alphanumeric, 15 positions; optional.</i>

Field	Description
Broker delivery type	Indicates whether the order is being fulfilled through the Order Orchestration Integration . Possible settings are: • Retail pickup = The order originated in an external system and Order Administration ships the order to the originating retail store location, where the customer picks it up • Delivery = The order originated in an external system, and Order Administration ships the order directly to the customer • Ship for pickup = The order originated in Order Administration, and Order Administration ships the order ships the order to a designated retail store location, where the customer picks it up

 Note:

An additional delivery type in which Order Administration assigns backordered items to Order Orchestration for fulfillment (brokered backorder) is not indicated here.

See the [Order Orchestration Integration](#) for an overview.

Display-only.

Sales Rep Store

The store number assigned to the order.

Store numbers are defined in and validated against the Store Cross Reference table; see [Work with Store Cross Reference \(WSCR\)](#). The system validates that the *Active* flag for the store on the order is selected; otherwise, an error message displays: Store is not active.

 Note:

The store number defined here does not have to be associated with the salesrep from the Order Header.

The [Maintain Originating Store # During Order Maintenance \(B23\)](#) secured feature controls whether you can update the *Sales Rep Store* field on the Work with Order Ship To Properties screen in Order Maintenance. If you do not have authority to this secured feature, the *Sales Rep Store* field is display-only.

Included in CWEmailOut: If the order is not fulfilled through Order Orchestration integration, the *OriginatingStore* element in the *Outbound Email XML Message (CWEmailOut)* specifies the sales rep store and the description and address information from its Store Cross Reference record. See the *OriginatingStore* element for more information.

For more information see the Order Administration Web Services Guide on <https://support.oracle.com> My Oracle Support (ID 2953017.1).

Alphanumeric, 10 positions; optional.

When you complete this screen: Select OK when you finish entering order properties. These values are associated with the current order only (except for the *Freight override/all ship-to's* field, which affects the primary order and all secondary orders) and does not update the customer record. You return to the initial Order Entry screen.

Adding Order Messages

Purpose: Use the [Work with Order Messages Screen](#) to add messages to the order for inquiry only or that optionally print on the customer's:

- Invoice
- Pick slip(s)
- Invoice and pick slip(s)
- Refund check
- Gift acknowledgments
- Custom pick slip or master pick slip
- Order Orchestration packing slip for drop ship orders
- Quotes

The messages you enter on this screen are used for the current order only. It is attached to the order you are entering, but not to any other order for the customer.

Order-level messages: These messages do not apply to specific items on the order. For item-level messages, see the [Work with Order Line Messages Screen](#).



Note:

In addition to entering messages in order entry, you can also receive them through the order API as part of a new order. Also, the BROKER process writes messages when it creates a new retail pickup or delivery order; see [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#).

In this topic:

- [Print Restrictions](#)
- [More Print Flag Information](#)
- [Work with Order Messages Screen](#)

Print Restrictions

Enter as many lines as necessary for the order message, but keep in mind that, if you print the message, your messages are limited to the space available on the documents.

Your messages print only if the print program you use supports them. The Order Administration base pick slip, invoice, and refund check print programs support printing customer messages; however, your unique print programs may not. These print programs are specified in the System Control table. The related system control value names, codes, and base programs are:

SCV Description	Application Area	Base Program	Menu Option to Print	Comments
Pick Printing Program (C37)	Fulfillment	PICKG	Streamlined Pick Slip Generation (WSPS)	Prints up to four message lines flagged to print on Both or print on Picks. Messages print on any pick slips for the order.
Refund Check Print Program (D23)	Customer Service	REFC HECK	Processing Refunds (MREF) and Reprint Refunds Screen (MREP) .	Prints up to three message lines flagged as Check Cust in the in the check stub area of the first refund check you print. Lines flagged as Check Int do not print on the base refund check. After printing, the system changes Check Cust flags to Chk Cst Msg Print and Check Int flags to Chk Int Msg Print. Change the flags back to include the messages on a subsequent refund check. When you reprint refunds, the messages from the original refund check print.
Gift Order Acknowledgement Print Program (B90)	Customer Service	GIFTA CKG	Streamlined Pick Slip Generation (WSPS)	Prints up to four message lines flagged as print on Both, print on Picks, or print as Gift Msg. NOTE: Message lines flagged as print as Gift Msg only print on gift orders.
Quote Printing Program (K73)	Order Entry	QUOTE or QUOTEG	Print/Email Quote Window in order entry/maintenance	Prints up to four message lines flagged as print on Quote. See Quote Form .

More Print Flag Information

Changing print flags/deleting message lines: The system does not prevent you from changing the print flag on an existing message line, or deleting message lines at any point; however, simply changing the flag or deleting the line may not produce the result you expect. The reason for this is that the system sometimes determines which message information to print by the position of the message line. For example, if you delete any message lines and then reprint a refund check, the correct messages do not print on the refund check because the system does not find the refund message lines in the expected positions.

To avoid errors, you should use a new line for each new message.

Reprinting refunds/additional refunds: A group of message lines remain associated with the refund check where they first print, so that if you need to reprint a refund check the correct messages appear. If there are additional transactions against the order and you print one or

more new refund checks after the first check, each group of message lines is associated with the check where they first appear.

For example, you enter a prepaid order with an overpayment, and print a refund check with a message explaining the reason. Subsequently, the customer returns an item, and you generate a new refund check with a message related to the return. If at any point you need to reprint the first refund check, the system includes the original message on the reprint.

Reprinting/additional pick slips and invoices: Any eligible message lines do print each time you print or reprint a pick slip or invoice. These message lines are not associated with any particular shipments against an order.

Reprinting quotes: Any eligible message lines print each time you print or reprint a quote. See [Quote Form](#).

Maximum lines for printing: If you enter more message lines than can print on the refund check, the flags on the unprinted lines still change to a printed status after you print the check. For example, if you enter five lines with a Chk Cust flag and use the base refund check print program, only three lines print on the check, yet all five lines are flagged as printed.

Work with Order Messages Screen

How to use this screen: Select Next to enter or review additional messages, when necessary.

The option to print is available for each line of order messages. For example, if you want each line to print on the invoice and pick slips, you must enter this print code for each order message line. Alternatively, some order messages you enter may be for use by Customer Service; in this case, enter the code that specifies that the message should not print at all.

Enter the order message(s). Notice that these order messages now appear in inquiry mode, meaning that you cannot update them. You must select Add/Change to update existing order messages.

View order messages in FIFO or LIFO sequence? The word FIFO or LIFO is in the top right corner of the screen indicating if you are viewing:

- order messages in FIFO (first in, first out; meaning oldest to newest messages) sequence, *or*
- order messages in LIFO (last in, last out; meaning newest to oldest messages) sequence

Select View by FIFO/LIFO to toggle between viewing order messages in FIFO sequence or LIFO sequence; when you first advance to the screen, order messages display in FIFO sequence.

The system looks at the *Date* for the order message to determine the FIFO and LIFO sequence. Within each date, the system displays the order messages in sequence.

Example: When you view the order messages in FIFO sequence the messages are listed as:

Sequence number	Date
order message sequence 1	11/25/06
order message sequence 2	11/25/06
order message sequence 3	11/26/06
order message sequence 4	11/27/06

When you view the order messages in LIFO sequence, the messages display as:

Sequence number	Date
order message sequence 4	11/27/06
order message sequence 3	11/26/06
order message sequence 1	11/25/06
order message sequence 2	11/25/06

Default messages: Default messages are standard order or gift messages that you enter on orders on a regular basis. Instead of having to retype a standard message, the user can select from the correct message from a list. This option saves time and helps avoid typographical errors. When a user selects a default message to add to an order, the message text defaults to the *Message* field, and the print code defaults to the *Print* field; however, the user can still override the default message text and the print code or add to the default message text. For example, after selecting *Happy Birthday*, the user can modify the message line to read *Happy Birthday, Mom! Love, Alex and Beth*.

To add a default message: Use the following steps to add a default message to the Work with Order Messages screen.

1. At the Work with Order Messages screen, select the prompt arrow next to a blank *Message* field to advance to the Select Default Message Screen.
2. At the [Select Default Message Screen](#), review and select a default message. When you select a default message, the system returns you to the Work with Order Messages screen and:
 - Defaults the [Message \(Default text\)](#) to the *Messages* field.
 - Defaults the [Print Code](#) for the default message to the *Print* field.
3. Optionally, modify the *Messages* field and *Print* field for the message line.

See [Working with Default Messages \(WMSG\)](#) for more background.

Change or delete existing messages? The [Modify Existing Messages \(A30\)](#) secured feature controls the ability to change or delete an existing order message.

How to display this screen: Select Messages at the [Work with Order Screen](#) or in standard or streamlined order inquiry.

If you [Use Workflow Management \(H96\)](#):

- select Notes for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or [Workflow Management Screen](#) (tickler supervisor)
- select OK at the [Create Tickler Screen](#)
- select Notes at the [Change Tickler Screen](#) or Display Tickler Screen.

Field	Description
Order #	A unique number assigned by the system to identify an order. <i>Numeric, 8 positions; display-only, assigned by the system.</i>
Sold to (Sold-to customer number)	A number assigned by the system to identify the customer placing an order. <i>Numeric, 9 positions; display-only, assigned by the system.</i>

Field	Description
Customer name (Unlabeled field to the right of the customer #)	The last, first and middle initial of the sold-to customer (the customer who is placing the order). If there is a company name, this information appears first, followed by the word ATTN: and the customer contact name. Last name The customer's last name. <i>Alphanumeric, 25 positions; display-only.</i> First name The customer's first name. <i>Alphanumeric, 15 positions; display-only.</i> Initial The initial of the customer's middle name. <i>Alphanumeric, 1 position; display-only.</i> Company name The company name. <i>Alphanumeric, 30 positions; display-only.</i>
Ship to (Ship-to number)	The sold-to number of the customer to receive shipment of the order, if it is different from the sold-to customer. This number is blank if the order is shipped to the sold-to customer. <i>Numeric, 9 positions; display-only, updated by the system.</i>
Customer name (Unlabeled field to the right of the Ship-to)	The last, first and middle initial of the ship-to customer (the customer who receives the order). If there is a company name, only this information appears. Last name The customer's last name. <i>Alphanumeric, 25 positions; display-only.</i> First name The customer's first name. <i>Alphanumeric, 15 positions; display-only.</i> Initial The initial of the customer's middle name. <i>Alphanumeric, 1 position; display-only.</i> Company name The company name. <i>Alphanumeric, 30 positions; display-only.</i>

Field	Description
Messages	Use these fields to enter message lines for this order. These messages are attached to the current order only, and do not update the customer record. You can flag a message to print by entering a code in the Print field; however, you can also enter non-printing order messages for inquiry only. The customer does not see these messages. The system treats each order message line as a separate message, so you can specify a different printing option for each order message line. Default Message Select the prompt arrow next to a blank <i>Messages</i> field to advance to the Select Default Message Screen, where you can review and select a default message to default its message text and print code to the <i>Messages</i> and <i>Print</i> fields. Default messages are defined in and validated against the Default Message table. <i>Alphanumeric, 60 positions each line.</i>
Print	The code you enter in this field determines whether the order message line prints or is available for internal use only. Valid values are: • Both = Print on both invoice and pick slip • Check Cust = Print on refund check only • Gift Msg = Gift message • Invoices = Print on invoice only • Nowhere or blank = Do not print • Picks = Print on pick slip only • Quote = Print on the Quote Form • Check Int = Print on detachable area of refund check not visible to the customer • User = Print on the document defined by the user, such as a custom pick slip. If there is no user-defined document, the message does not print anywhere in Order Administration. You must enter a print flag for each order message line to define how the system handles the message, whether it prints it, and where it prints it. See Print Restrictions. <i>Optional.</i>
Date	The date when the message was created. <i>Numeric, 6 positions (in user date format); display-only.</i>
User	The user ID of the person who entered the message. If the order was generated through the Generating Membership Orders (EGMO) option, the user ID identifies the person who submitted the membership generation job. <i>Alphanumeric, 10 positions; display-only.</i>

When you complete this screen: Select OK when you finish entering, reviewing or deleting order messages. These order messages are attached to the current order only.

Screen Option	Procedure
Toggle between displaying order messages in FIFO (first in, first out; meaning oldest to newest message) or LIFO (last in, first out; meaning newest to oldest message)	Select View by FIFO/LIFO. The word FIFO or LIFO is in the top right corner of the screen, depending on which message order you are viewing.
Switch between having previously entered messages enterable or display-only	Select Add/Change. To change: Position your cursor in the message line and edit it as needed. You can also change the setting of the <i>Print</i> flag. Click OK when you are done. To delete: Double-click a message line to select it and then delete the text. You also need to clear the <i>Print</i> flag and click OK to delete the message.

 Note:

This option is not available if you do not have authority under the [Modify Existing Messages \(A30\)](#) secured feature.

Adding Miscellaneous Charges or Credits in Order Entry

Purpose: Use the [Enter Additional Charges Window](#) to add a miscellaneous charge or credit to an order.

In this topic:

- [About Default Charges](#)
- [Error Messages](#)
- [Change Additional Charges Screen](#)

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

The additional charges you enter on the [Enter Additional Charges Window](#) are order-level additional charges, and are not associated with any particular item. The additional charges you enter for an item (for special handling, gift wrapping, etc.) do not appear at this window.

Additional charge codes are defined in the Additional Charges table. See [Establishing Additional Charge Codes \(WADC\)](#).

Secured feature: Access to the [Enter Additional Charges Window](#) is controlled by the [Additional Charges Access \(A24\)](#) secured feature.

Entering a S/H additional charge: In these situations, you might add a special handling additional charge code on the [Enter Additional Charges Window](#):

- The item is ineligible for special handling normally, but you are making an exception,

- You are offsetting a special handling charge with a credit so that the special handling performed on an item is provided at no charge or at a reduced charge,
- The item requires special handling and carries a predefined charge; however, you are adding an additional charge for extra work performed on the item.

When you add a special handling additional charge code to the order at the [Enter Additional Charges Window](#), the [Work with Special Handling Screen](#) or [Work with Custom Special Handling Screen](#) does not open for you to define how you want to personalize the item. These screens open only when you enter a special handling additional charge code in the *S/H* field for the line (or when the SKU/Offer record is set to a special handling code that require a specific type of special handling).

Additionally, when you add a special handling additional charge code on the [Enter Additional Charges Window](#), the special handling code is not associated with a particular order detail line and no special handling instructions print on the pick slip for the item.

Bills when? An additional charge does not bill until the order goes through billing for some reason. If the order is already closed, you might force the additional charge to bill by adding an express-billed item to the order.

Order totals: Additional charges or discounts are added to or subtracted from the order total, but are broken out from the order totals in the *Chg* field.

Charge or credit? When an additional charge represents a credit use Field Minus or - when you enter the dollar value in the *Amount* field to identify the additional charge as a credit and back this amount out of the order total.

Entering a Credit: For example, you are crediting a customer for long-distance telephone charges because there was a problem with a previous order.

Use these steps:

1. Enter the appropriate additional charge code.
2. Enter the amount in the *Amount* field.
3. Press - to make this a negative value.
4. Select OK.

Entering a Charge: For example, you are charging a customer to special handle an item that is not typically personalized.

Use these steps:

1. Enter the appropriate additional charge code.
2. Enter the amount in the *Amount* field.
3. Select OK.

About Default Charges

You can use the [Restrict Additional Charge Amount if Default Charge \(F43\)](#) system control value and the [Enter Amount for Order Additional Charge Code \(A80\)](#) secured feature to control which operators can add additional charges to an order.

These fields affect only:

- the [Enter Additional Charges Window](#), available by selecting Additional Charges in order entry, order maintenance, and the streamlined version of Work with Return Authorizations (see [Introducing Return Authorizations \(WRTA\)](#)); and,

- the [Change Additional Charges Screen](#), available by selecting Change for an additional charge code at the [Enter Additional Charges Window](#).

These two values work in combination:

	Restrict Additional Charge Amount if Default Charge (F43) SCV is selected	Restrict Additional Charge Amount if Default Charge (F43) SCV is unselected
Enter Amount for Order Additional Charge Code (A80) authority is set to *ALLOW	The <i>Amount</i> field at the Enter Additional Charges Window is enterable only if there is not a <i>Default charge amount</i> for the additional charge code. If the additional charge code has a default amount specified, this amount defaults and you must use the Change Additional Charges Screen to override it. The <i>Amount</i> field at the Change Additional Charges screen is always enterable.	The <i>Amount</i> field is always enterable at the Enter Additional Charges Window or at the Change Additional Charges Screen. If you enter just the additional charge code for a code that has a default amount specified, this amount defaults. However, if you enter the additional charge code but enter an override amount, the override amount is added to the order.
Enter Amount for Order Additional Charge Code (A80) authority is set to *EXCLUDE	The <i>Amount</i> field is never enterable at the Enter Additional Charges Window or at the Change Additional Charges Screen .	

Error Messages

This table describes the error messages the screen might display when you enter an additional charge, and their reasons:

Error Message	Displayed when?	Description/More Information
Not authorized to access additional charges.	you select Charges to display the Enter Additional Charges Window	You do not have authority to work with additional charges. The dAdditional Charges Access (A24) secured feature controls this authority.

Error Message	Displayed when?	Description/More Information
Negative additional charge exceeds the limit for this order.	you enter a negative additional charge	You have attempted to add a negative additional charge that would bring the total negative additional charges on the order over the limit specified in the Negative Additional Charge Limit (E49) system control value, and if you do not have authority to exceed this limit. This authority is controlled by the Override Negative Additional Charge Limit (A60) secured feature, and applies to miscellaneous additional charges only.

 Not**e:**

Negative additional charges that are added by the system are not included in the negative additional charge total; also, the total is not decreased by positive additional

Error Message	Displayed when?	Description/More Information
		charges.
Charge amt is restricted because there is a default defined.	you enter a charge code and an amount	This message displays if: the Restrict Additional Charge Amount if Default Charge (F43) system control value is selected, and you have authority to enter an amount under the Enter Amount for Order Additional Charge Code (A80) secured feature (otherwise the <i>Amount</i> field would not have been enterable; see About Default Charges)

Enter Additional Charges Window

How to display this screen: Select Additional Charges at the [Work with Order Screen](#), [Work with Order/Recap Screen](#), or [Work with Order Lines Screen \(Adding Items to the Order\)](#) in Order Entry.

Field	Description
Order #	A number assigned by the system to identify an order. <i>Numeric, 8 positions; display-only, assigned by the system.</i>
Ship-to number (Unlabeled field to the right of the order number)	A number to identify the shipping address on the order <i>Numeric, 3 positions; display-only, assigned by the system.</i>
Sold-to (Sold-to customer number)	A number to identify the customer. <i>Numeric, 9 positions; display-only, assigned by the system.</i>
Customer name (Unlabeled field to the right of the sold-to number)	The customer's last name, first name, and initial. <i>Alphanumeric, 41 positions; display-only.</i>

Field	Description
Add'l chg code (Additional charge code)	A code for a type of charge or credit applied to the order. Additional charge codes are defined in and validated against the Additional Charge table. See Establishing Additional Charge Codes (WADC). Special Handling Additional Charge Codes You can further define additional charge codes as special handling codes by entering a value in the <i>S/H fmt</i> field when you are setting up the additional charge code. Special handling refers to any type of item personalization you offer, such as engraving, monogramming, alterations, etc. Additional Charge Fees You can define additional charge codes for any reason, such as freight fees (such as shipments to Alaska and Hawaii), postage, guaranteed delivery (shipment guaranteed within 24 hours...), gift wrapping oversized items, and store restocking fees, for example. Additional Charge Credits You can define additional charge codes for any reason to credit the customer's order, such as long-distance telephone charges, no charge for freight, etc. You can enter a negative number in the <i>Amount</i> field to credit the customer. You can limit the total amount of negative additional charges applied to an order by entering a dollar value in the Negative Additional Charge Limit (E49) field in the System Control table. See Error Messages. <i>Alphanumeric, 2 positions; required.</i>
Amount	The amount of the charge or credit. Press - after the amount to enter the amount as a credit. Default charge amount If you have set up a default charge amount for the additional charge code, this amount will default. Is this field enterable? Not enterable if: - the Restrict Additional Charge Amount if Default Charge (F43) system control value is selected (regardless of your authority level) and there is a default charge specified for the code you entered, or - you do not have the authority to enter an amount. Do you have authority to enter an amount? Authority to enter a charge amount is based on the Enter Amount for Order Additional Charge Code (A80) secured feature. If selected: You can change the charge amount by selecting Change for the additional charge code once you have added it and entering a different amount at the Change Additional Charges Screen. If unselected: You will be able to enter additional charge codes only if they have default charge amounts defined. See About Default Charges. <i>Numeric, 13 positions with a 2-place decimal; required or display-only.</i>
Description	The description of the additional charge code. <i>Alphanumeric, 30 positions; display-only.</i>

Field	Description
Billed	Indicates whether the customer has been billed for the additional charge. Valid values are: Selected =Customer has been billed for the additional charge. Unselected =Customer has not been billed for the additional charge. If the charge has been billed, you cannot change or delete the additional charge.

Screen Option	Procedure
Enter an additional charge	Complete the additional charge code field and, depending on your settings and authority, the amount, and select OK.
Change an additional charge	Select Change for an additional charge. See Change Additional Charges Screen .
Delete an additional charge	Select Delete for an additional charge to display the confirm delete pop-up window.

 Note:

You can delete an additional charge only if it has not already been billed.

Freight by order weight freight method: During Order Entry, if you remove additional charges from the order when using the freight by order weight freight method, the system adds the additional charges back to the order when it calls repricing during the final order accept.

Change Additional Charges Screen

Purpose: Use this screen to change an additional charge code or the amount of the charge.

If the Restrict Additional Charge Amount if Default Charge (F43) system control value is selected, you will need to use this screen to override any default charge; however, you will be able to do so only if you have the proper authority based on the Enter Amount for Order Additional Charge Code (A80) secured feature. If you do not have the authority to change the amount, you will need to change the charge code itself, or delete the code and add a different one.

How to display this screen: Select Change for an additional code at the [Enter Additional Charges Window](#).

If the additional charge has already been billed, each field on this screen will be display-only.

Field	Description
Order#	A number assigned by the system to identify an order. <i>Numeric, 8 positions; display-only, assigned by the system.</i>

Field	Description
Ship-to number (Unlabeled field to the right of the order number)	A number to identify the shipping address on the order <i>Numeric, 3 positions; display-only, assigned by the system.</i>
Sold-to (Sold-to customer number)	A number to identify the customer. <i>Numeric, 9 positions; display-only, assigned by the system.</i>
Customer name (Unlabeled field to the right of the sold-to number)	The customer's last name, first name, and initial. <i>Alphanumeric, 41 positions; display-only.</i>
Add'l chg code (Additional charge code)	The additional charge code you selected at the Enter Additional Charges Window. You can change the code only if you have the proper authority and if the charge has not been billed. To change, enter a new additional charge code. If the Restrict Additional Charge Amount if Default Charge (F43) system control value is selected, and if you do not have the proper authority based on the Enter Amount for Order Additional Charge Code (A80) secured feature, you will not be able to enter an additional charge code that does not have a default amount specified; instead, a message will display: Must use an Additional charge with a default. Changing the additional charge code itself does not automatically change the charge amount. <i>Alphanumeric, 2 positions; required, or display-only if the additional charge has already been billed.</i>
Description	The description of the additional charge code. <i>Alphanumeric, 30 positions; display-only.</i>
Amount	The dollar amount of the charge or credit. Press - after the dollar amount to enter the amount as a credit. Default charge amount If you have set up a default charge amount for the additional charge code, this amount will default after you Tab through the <i>Amount</i> field and select OK. Is this field enterable? Not enterable if • you do not have the authority to enter an amount, or • the additional charge has already been billed. Do you have authority to enter an amount? Authority to enter a charge amount is based on the Enter Amount for Order Additional Charge Code (A80) secured feature. If selected: You can change the charge amount by typing the new amount and selecting OK. If unselected: At this screen, you will be able to change the additional charge code only, and only to an additional charge that has a default amount specified. See About Default Charges. <i>Numeric, 13 positions with a 2-place decimal; required or display-only.</i>

Field	Description
Billed	Indicates whether the customer has been billed for the additional charge. Valid values are: • Selected =Customer has been billed for the additional charge. • Unselected =Customer has not been billed for the additional charge. If the charge has been billed, you cannot change the amount or delete the additional charge.

Displaying More Options in Order Entry

Purpose: Select More Options on one of the following screens to display a screen that provides additional options related to order entry. These options are unavailable on the regular order entry screens.

Order entry:

- [Work with Order Screen](#)
- [Work with Order Lines Screen \(Adding Items to the Order\)](#)
- [Work with Order/Recap Screen](#)

Order maintenance:

- [Work with Order Screen in Order Maintenance](#)
- [Work with Order Lines Screen](#)

Display More Options Screen



Note:

Each field on this screen is display-only.

Field	Description
Order #	The number of the order and the order ship-to (shipping address) you are currently working with. <i>Order number: numeric, 8 positions.</i> <i>Ship-to number: numeric, 3 positions.</i>
Sold to	A unique number to identify the customer who placed the order, and the customer's name or company name. <i>Customer number: numeric, 9 positions.</i> <i>Name: alphanumeric, 41 positions.</i>
Bill to	The bill-to customer associated with the customer who placed the order. <i>Numeric, 7 positions.</i>

Options on this screen:

- Ticklers: select this option to work with ticklers associated with the order. See [Work with Ticklers Screen](#). *This option is available only if the [Use Workflow Management \(H96\)](#) system control value is selected.*
- Customer action notes: select this option to enter, update, delete or resolve an action issue for a customer. A pop-up action window opens each time you select the customer until the issue is resolved. See [About Customer Action Notes](#).
- Email for order: select this option to advance to the [Work with Email by Order Number Screen](#), where you can review or work with emails sent to or received from the customer related to the current order.
- Customer profile: select this option to create a demographic profile for the current customer, which may describe the customer's gender, age, income, geographic location, or other types of demographic data. See the [Work with Customer Profile Screen](#).
- Email for customer sold to: select this option to advance to the [Work with Email by Customer Sold To Number Screen](#), where you can review or work with emails sent to or received from the sold-to, ship-to, or bill-to customer on the order.
- Customer ownership: information will be provided at a later date.
- Customer notes: select this option to record or view information about the current customer. See [Edit Customer Notes Screen](#).
- Email for customer ship to: select this option to advance to the [Work with Email by Customer Ship To Number Screen](#), where you can review or work with emails sent to or received from the sold-to customer on the order.
- Void/reprint picks (order entry/maintenance only): select this option to void or reprint a pick slip for a previous order for the customer, if, for example, the customer wants to use a different shipping service. See the Reprint/Void Pick Slips by Order Screen in [Reprinting and Voiding Pick Slips \(WVRP or WSVP\)](#).
- Email for customer bill to: select this option to advance to the [Work with Email by Customer Bill To Number Screen](#), where you can review or work with emails sent to or received from the sold-to or bill-to customer on the order.
- Display picks: select this option to find out the status of picks printed for an order, such as when they were printed and/or confirmed. See the [Display Pick Tickets for Order Screen](#).
- Order totals: select this option to view accumulated totals across all shipping addresses (recipients) on an order. See [Display Order Totals Window](#).
- Customer email addresses: select this option to advance to the [Work with Customer Email Address Screen](#), where you can review and work with email addresses for a sold-to customer.
- Display invoices: select this option to advance to the [Display Invoices Screen](#) where you can review invoices associated with the order.
- Letter request: This option is not currently supported.
- Ticklers: select this option to work with ticklers associated with the order. See [Work with Ticklers Screen \(order view\)](#). *This option is available only if the [Use Workflow Management \(H96\)](#) system control value is selected.*
- Customer warranty information: select this option to review, create, change, and delete customer warranty information for a product on the order. See the [Work with Customer Warranty Information Screen](#).
- Customer memberships: select this option to review or work with membership programs you use to generate periodic orders for the customer. This screen displays each customer membership for the sold-to customer on the current order. This information appears only for the customer who purchased the membership, not the recipient (if any). If the

membership was created through order entry rather than the Work with Customer Membership menu option, the order number appears on this screen. You cannot create a customer membership through this screen. See [Working with Customer Memberships \(WWCM\)](#).

- Display carton contents: select this option to review the contents of a carton that has shipped.
- Display batch OM transactions: select this option to review errors created when the customer attempted to maintain or cancel this order from the web storefront. See [Working with Batch Order Maintenance Transactions \(WBOM\)](#).
- Print/Email Quotes: Select this option to advance to the [Print/Email Quote Window](#), where you can select to print the Quote form or generate the Quote Confirmation email. See [Entering Pre-Order Quotes](#).

 Note:

This option is available only for orders whose order type has the *Quote* option selected. In addition, this option does not display if the [Quote Printing Program \(K73\)](#) and [Quote Confirmation Email Program \(K74\)](#) system control values do not contain a value or if all of the items on the quote are soldout and the *Exclude S/O on order confirmation* field for the order type on the quote is selected.

- Customer order item history: Select this option to display the [Customer Order Item History Screen](#)
- Rewards Points: Not implemented.

For more information: Each option available from this screen is described in [Displaying More Options in OIOM](#).

Entering User Fields

Purpose: Use the [Enter User Fields Screen](#) in Order Entry to capture any type of additional information about the customer.

For more information: On setting up user-defined fields, see [Setting Up User-Defined Fields \(WUDF\)](#)

Enter User Fields Screen

How to display this screen: At the [Work with Order Screen](#) enter a new or existing customer and, based on the settings of these system control values, the Enter User Field screen opens:

- [User-defined Field Prompting for Existing Customers \(D33\)](#)
- [Customer Class for User Defined Field Prompting \(G04\)](#)

These two system control values work together to determine if:

- The system prompts for new and/or existing customers, or both.
- Whether the prompt is restricted to a particular customer class.
- Whether the [Enter User Fields Screen](#) continues to prompt until the user-defined information is supplied.

You can enter user-defined fields for customers at this screen in Order Entry only if the user-defined *File Code* is CST for Customer Sold To.

Field	Description
Customer #	A unique number to identify the customer who placed the order. <i>Numeric, 9 positions; display-only, assigned by the system.</i>
Customer name (Unlabeled field to the right of the customer number)	The name or company name associated with the customer number. <i>Alphanumeric, 41 positions; display-only.</i>
Fields	The label associated with the user-defined field. The corresponding entry field appears to the right of the field label. User fields are defined in the User Defined Field table. Only fields identified as “input” appear on the Enter User Fields screen in order entry. You can also work with user fields through an option in customer maintenance, where “output” fields are also available. The three types of user-defined fields are: Numeric = Appear on the left side of the screen. <i>Numeric, 16 positions; optional.</i> Text = Appear in the center of the screen. <i>Alphanumeric, 30 positions; optional.</i> Date = Appear on the right side of the screen. <i>Numeric, 6 positions (in user date format); optional.</i>

Working with Order Summary Information

Purpose: Use the [Display Order Summary Screen](#) to:

- Review all of the items ordered for the current order plus any recipient orders. The Order Summary screen lists each item ordered for each shipping address so you can verify the items ordered.
- Accept the order information for the recipient you are currently working with and switch to another recipient so you can work with the order information for that recipient. When you select another recipient, the system advances you to the order header screen for the recipient you selected.
- Copy an item from a recipient to the recipient you are currently working with. When you copy an item, the system adds an order line to the current order ship-to for each item copied.
- Review the order totals in the customer's currency.

Foreign currency view: The foreign currency view is not necessary or correct if you process orders in multiple currencies by offer (the [Multi Currency by Offer \(E03\)](#) system control value is selected). In this situation, the dollar values on the order are already in the customer's currency.

This screen is available from Order Entry only.

In this topic:

- [Display Order Summary Screen](#)
- [Switching to Another Recipient](#)
- [Copying Items from One Recipient to Another](#)
- [Display Selected Items Window](#)

- [Select Order Recipient Screen](#)
- [Displaying Order Totals in Foreign Currency](#)
 - [Important Information](#)

Display Order Summary Screen

Purpose: Use this screen to review the items ordered for each recipient on the order.

How to display this screen: Select Summary or Return/Summary at the [Work with Order Screen](#) or [Work with Order/Recap Screen](#).

Field	Description
Order #	The number of the order you are currently working with. <i>Numeric, 9 positions; display-only, assigned by the system.</i>
# Rcp (Number of recipients)	The number of recipients on this order. This is the number of shipping addresses on the order. <i>Numeric, 3 positions; display-only, assigned by the system.</i>
Prepaid	The total dollar amount prepaid on this order using checks. <i>Numeric, 20 positions with a 2-place decimal; display-only, calculated by the system.</i>
Balance	The balance due on the order, calculated by subtracting the order total (current order plus all recipient orders) from the prepaid amount. If the balance is 0, this means that the customer prepaid the entire order. If the balance is negative, there is a balance due that will be charged to the customer. <i>Numeric, 20 positions with a 2-place decimal; display-only, calculated by the system.</i>
Current recip (Current recipient)	The ship-to number indicating the recipient you are currently working with. <i>Numeric, 3 positions; display-only.</i>
Merch (Merchandise)	The total value of merchandise on this order, which is calculated by multiplying the quantity ordered by the item's price. This amount does not include charges for freight (shipping), sales tax, or handling. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Frt (Freight)	The total charge for shipping the current order plus any recipient orders. Shipping charges are based on the freight method defined for the source code used on the order. This amount also includes any service charges by ship via and order weight charges by ship via. See Working with Ship Via Codes (WVIA) . This amount does not include any additional charges associated with shipping this item (see the <i>Frt+</i> field for these totals). Blank if no freight is charged on the order (<i>Calc freight</i> = Unselected). <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>

Field	Description
Frt+ (Additional freight)	The total additional freight charges on the current order plus any recipient orders. Additional freight charges can be defined for a shipper in the Ship Via table. For example, a shipper can charge a premium for overnight or Federal Express deliveries. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Chg (Additional charges)	The total extra charges added to the current order and any recipient orders. This can be an additional service charge defined for the source code or offer used on the order, an additional shipping charge for an item on the order, a guaranteed service charge defined for the offer, or any type of miscellaneous charge or credit added to the order. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Tax	The total sales tax on the current order and any recipient orders, based on the merchandise dollar value of the order and, optionally, freight and special handling. Tax does not accumulate here for orders subject to VAT and tax-inclusive pricing. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Hnd	The total charge, on the current order and any recipient orders, for special handling, gift wrapping, or duty. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Total	The grand total of all charges on the current order and any recipient orders. This includes merchandise, freight, additional freight, additional charges, tax, and handling. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Shp (Ship To number)	The number of the shipping address on the order. <i>Numeric, 3 positions; display-only, assigned by the system.</i>
Name	The initial and last name or company name of the customer the order is shipping to. The customer or company name is included next to the first detail line for each customer. <i>Alphanumeric, 10 positions; display-only.</i>
Ln#	The line number of this item on the order. <i>Numeric, 3 positions; display-only.</i>
Qty (Quantity)	The number of units ordered of the item. <i>Numeric, 5 positions; display-only.</i>
Item	A code for a unit of inventory that you sell. <i>Alphanumeric, 12 positions; display-only.</i>
SKU	The style of the item, such as its color or size. <i>Alphanumeric, three 4-position fields; display-only.</i>
Via	A code for the carrier or service that will deliver the order. Ship via codes are defined in and validated against the Ship Via table. <i>Numeric, 2 positions; display-only.</i>

Field	Description
Price	The selling price of a single unit of this item. The system calculates the price by taking into account any price breaks, source or order discounts. The system calculates the price using the pricing hierarchy in the System Control table. <i>Numeric, 13 positions with a 2 place decimal; display-only, calculated by the system.</i>
Whs (Warehouse)	A code for the warehouse the item will ship from. Warehouse codes are defined in and validated against the Warehouse table. <i>Numeric, 3 positions; display-only.</i>
SA (Ship alone code)	Identifies whether the item can ship with other items. Valid values include: S = Ship alone: item cannot be shipped with other items. A pick prints for each unit ordered. M = Multi-ship: item can ship with other items. L = Picks print in location code sequence. U = User-defined. This information is taken from the <i>Ship alone</i> field in the Item table. <i>Alphanumeric, 1 position; display-only.</i>
Item description (Unlabeled field below the Shp field)	The description of the item being ordered. <i>Alphanumeric, 120 positions; display-only.</i>
SKU description (Unlabeled field below the SKU field)	The description of the SKU for the item. <i>Alphanumeric, 25 positions; display-only.</i>
Extended price (Unlabeled field below the Whs field)	The total charge for this item, which is calculated by multiplying the price of the item by the quantity ordered. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>

Screen Option	Procedure
Accept the order information for the recipient you are currently working with and switch to another recipient.	Select recipient and accept current for a recipient to advance to the order header screen where you can work with the order information for the selected recipient. See Switching to Another Recipient .
Copy an item to the recipient you are currently working with	Select Copy item to current recipient for a recipient's order line that includes the item you wish to copy. See Copying Items from One Recipient to Another .
Display the order totals at the top of the screen in the customer's currency or in the system currency (from the Local Currency Code (A55) system control value).	Select Foreign Curr Dsp. See Displaying Order Totals in Foreign Currency .
Review the items selected to copy	Select Dsp Item to Copy to advance to the Display Selected Items Window .

Screen Option	Procedure
Accept the order information for the recipient you are currently working with and advance to the Select Order Recipient screen	Select Acpt/Switch Rcp to advance to the Select Order Recipient Screen .

Switching to Another Recipient

Purpose: Select recipient and accept current for a recipient at the [Display Order Summary Screen](#).

An error message indicates if you select recipient and accept current for the recipient you are currently working with:

Selected ship to (3) must be different than current ship to (3).

When you select recipient and accept current for a recipient, the system accepts the order information for the recipient you are currently working with and advances you to the [Work with Order Screen](#) for the recipient you selected.

Copying Items from One Recipient to Another

Purpose: From the [Display Order Summary Screen](#) you can copy items from other recipients on the order to the recipient you are currently working with.

Copying items to current recipient: Select Copy item to current recipient for an item defined for a recipient other than the recipient you are currently working with. A message indicates when you select an item to copy:

Item (S5Y) has been selected for copy to current recipient (3).

An error message indicates if the item you selected to copy is included in the order for the recipient you are currently work with:

Selected ship to (3) must be different than current ship to (3).

You can copy as many items from as many different recipients as you want. The system logs the items that you have selected and does not copy them to the current recipient until:

- you select recipient and accept current for a recipient to accept the current recipient's information and switch to another recipient
- you select Exit to exit the screen.
- you select Acpt/Switch Rcp to accept the current recipient's information and advance to the [Select Order Recipient Screen](#).

When you accept the current recipient's order information, the system advances you to the [Display Selected Items Window](#). This window lists each item that you have selected to copy to the current recipient. In order to continue with the order, you must confirm the items that you wish to copy or delete them from the copy list.

Item information copied: The system copies the item to the current customer including any changes you have made to the item or any special characteristics of the item. For example:

- if you changed the price of the item and then copied the item to the recipient you are currently work with, the system would copy the item with the price you defined.

- if the item is defined as a special handling item or custom special handling item, the system advances you to the [Work with Special Handling Screen](#) or [Work with Custom Special Handling Screen](#) where you can enter the handling charge and the handling information.
- if the item is defined as a main set item, the system copies the item and its components. If you copy a component item, the system copies the item with a price of zero and retains the no charge flag and price override code.
- if the item is an accompanying item, the system defaults the accompanying item to the current recipient's order.

The system also performs the normal edits for items selected to copy to the current recipient. For example, if the item selected to copy uses a ship via that is not valid with the current recipient's zip code, an error message indicates:

Ship via (2) is not valid with ship to zip code (011).

Display Selected Items Window

Purpose: Use this window to review the items that you have selected to copy to the recipient you are currently working with and:

- add the items to the current recipient's order
- delete selected items from the copy list
- remove all items in the copy list

How to display this screen: At the [Display Order Summary Screen](#),

- Select recipient and accept current for a recipient after you have previously selected items to copy.
- Select Exit after you have previously selected items to copy.
- Select Dsp Item to Copy.
- Select Acpt/Switch Rcp after you have previously selected items to copy.

Field	Description
Item	The code for the item you have selected to copy. <i>Alphanumeric, 12 positions; optional.</i>
SKU	The SKU of the item you have selected to copy. <i>Alphanumeric, three 4-position fields; optional.</i>
Qty (Quantity)	The number of units of the item you selected to copy. <i>Numeric, 5 positions; display-only.</i>

Screen Option	Procedure
Delete an item from the copy list	Select Delete for the item you wish to delete to delete it.

Screen Option	Procedure
Add the items on the copy list to the current recipient's order	Select OK. The system adds the items on the copy list to the current recipient's order. You can work with the items added to the order on the Work with Order Line Screen (Changing/Adding an Item) .
 Note: You can only add the items to the current recipient's order if you advanced to the Display Selected Items pop-up window by selecting a recipient or selecting Exit or Acpt/Switch Rcp.	
Remove all items from the copy list	Select Delete All to remove all items from the copy list. The system advances you to the Clear Selected Items pop-up window. Select OK to confirm the delete of all items or select Exit to cancel

Select Order Recipient Screen

Purpose: Use this screen to select an existing recipient to work with or add a new recipient to the order.

How to display this screen: Select Acpt/Switch Rcp on the [Display Order Summary Screen](#).

Field	Description
Order #	The number of the order you are currently working with. <i>Numeric, 9 positions; display-only.</i>
Sold to	The number and name of the customer who placed the order. <i>Sold to customer number: Numeric, 9 positions; display-only.</i> <i>Sold to customer name: Alphanumeric, 40 positions; display-only.</i>
Rcp	The ship-to number of each recipient on this order. <i>Numeric, 3 positions; optional.</i>
Customer #	A unique number assigned to each recipient on the order. <i>Numeric, 9 positions; display-only.</i>
Name	The name of each recipient on this order. <i>Alphanumeric, 40 positions; display-only.</i>
Sts (Order status)	A code that indicates the current status of the order. Valid values are: • Suspended • Open • Held • Cancelled • Closed • Error • Purged The system places an order in a suspended status until the order is accepted (Acpt/Switch Rcp) and processed. Enter a status code to display status codes that match your entry. <i>Optional.</i>

Field	Description
Merch amt (Merchandise amount)	The total dollar value of merchandise on the order, which is calculated by multiplying the quantity ordered by the item's price. This amount does not include charges for freight (shipping), sales tax, or handling. <i>Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.</i>
Address (Customer address)	The address for each recipient on this order. The address consists of the street address, city, state and zip code. <i>Street address: Alphanumeric, 32 positions; display-only.</i> <i>City: Alphanumeric, 25 positions; display-only.</i> <i>State: Alphanumeric, 2 positions; display-only.</i> <i>Zip code: Numeric, 10 positions; display-only.</i>

Screen Option	Procedure
Select a recipient	Select a recipient to advance to the Work with Order Screen of the selected recipient.
Add a recipient to the order	Select Add Recipient to create a new recipient for the order. See Adding a Recipient Order in Order Entry .

Displaying Order Totals in Foreign Currency

Purpose: Use this function to convert, then display the order totals in the customer's currency.



Note:

The foreign currency view is not necessary or correct if you process orders in multiple currencies by offer (the Multi Currency by Offer (E03) system control value is selected). In this situation, the dollar values on the order are already in the customer's currency.

Using this feature: Select Foreign Curr Dsp at the [Display Order Summary Screen](#) to convert the order totals to the customer's currency.

About currency conversion: When you select Foreign Curr Dsp, the system gets the country code for the sold-to customer (which is the customer who placed the order), then checks the Currency table.

If a currency code has been defined for this country, the system multiplies each order total bucket by the conversion rate, and displays the order totals in the customer's own currency. This way, the order total is more meaningful to the customer.

Example: A customer calls from Italy to place an order. You enter the order, then select Summary to review the order totals. Next, you select Foreign Curr Dsp to display the totals expressed in the customer's own currency. The system performs the currency conversion immediately, using the current conversion rate from the Currency table, and updates the order totals appropriately.

Important Information

- The system issues a message if there is no currency record defined for the customer's country in the Currency table, and you will not be able to view the order totals in the customer's currency when you select Foreign Curr Dsp:

No currency match found for country XXX.

- The value in the *Total* field is the sum of all other order totals fields (*Merch*, *Frt*, *Frt+*, *Chg*, *Tax*, and *Hnd*); no conversion is performed on this field.
- Currency values extending beyond 2 decimal places are rounded up or down to the nearest dollar value.
- The country code and the currency code must be the same for order totals conversion.
- The order totals are converted using the current currency rate. This means that the order totals you see on this screen may be different from the order totals at shipping time.
- Selecting Foreign Curr Dsp toggles between displaying the order totals in the customer's (foreign) currency or in the system currency.

Posting a Return or Exchange Through Order Entry

Purpose: You can use Order Entry to enter a new order for an item being returned when:

- you have converted your orders and cannot post the return against the original order number
- you have purged the original order from the system
- a customer paid for the item with more than one payment type (such as a check and credit card), but wants you to credit the credit card the full amount of the return

In this topic:

- [Return Updates in Order Entry](#)
- [Returning an Item in Order Entry](#)
- [Enter Return/Exchange Reason Window](#)
- [Exchanging an Item in Order Entry](#)

Return Updates in Order Entry

These updates occur for returns entered through Order Entry:

- order is updated to X (closed) status if the entire order is a return
- order is open if an exchange item was entered; this item reserves and ships in the normal way
- the number and dollar amount for returns are updated by the quantity returned; however, the number and dollar amount of orders are not updated
- a refund, such as a credit card credit or a refund check, will be generated for this order when you process refunds

Refund check messages: You can use the [Work with Order Messages Screen](#) to enter messages that will print on the customer's refund check. The messages will print only if you use the base refund check print program (CSR0836), or if your unique refund check printing program supports messages.

Return Authority: In order to post a return or exchange through order entry, you must have authority to the following secured features:

- [Enter Return Authorization \(A28\)](#)

- [Receive Return Authorization \(A29\)](#)
- [Credit Return Authorization \(A34\)](#)

If you do not have authority to these secured features, the system displays an error message when you try to post a return or exchange in order entry: *User is not authorized to process a return.*

Return authorization download triggers: If the [Create Return Download Triggers \(K28\)](#) system control value is selected, the system creates a return authorization download (RAD) trigger when you post a return through order entry, based on the trigger rules defined for the Return Authorization Download (RETURN_OUT) integration layer job. The RETURN_OUT integration layer job monitors for return authorization download triggers and generates a *Return Authorization Outbound XML Message (CWReturnRAOut)* to send the return authorization information to a remote system.

Returning an Item in Order Entry

Use the following steps to return an item in order entry.

1. At the [Select Customer Sold To For Order Screen](#) in Order Entry, select the customer who is returning the item.
2. Complete the [Work with Order Screen](#).
3. Enter the code for the item being returned at the [Work with Order Lines Screen \(Adding Items to the Order\)](#).
4. At the *Qty* field, enter the number of units of the item being returned. Make sure to enter this number as a negative number to process a return.
5. Optionally, at the *Price* field, enter the price the customer paid for the item. This is the amount you will credit to the customer, and can be different from the current price of the item.
6. At the *Ovr* field, enter the reason code for overriding the price of the item, if needed.
7. Select OK to advance to the [Enter Return/Exchange Reason Window](#).

Enter Return/Exchange Reason Window

At this window, you must tell the system how to process the return.

1. At the *Return reason* field, enter the reason code for the return.
2. At the *Return disposition* field, enter the return disposition code for the return. The system uses the [Default Disposition Code \(C18\)](#), but you can override it. An error message indicates if you do not have authority to the return disposition value: *User Does not have authority to return disposition code.*
3. Enter the code for the warehouse and location to which the item is being returned. These fields default from the Item or SKU table, or from the return disposition code, but you can override them.
4. Optionally, deselect the *Refund duty* field if you do not want to refund any duty for the item. This field defaults to selected.

Note:

If the *Refund duty* field is selected and duty was not calculated for the item, the system automatically updates this flag to unselected when it creates the RA Detail record.

5. Select OK. The item is added to the new order with a negative quantity and a negative dollar amount. This means that you are posting a return and crediting the customer.

The system displays an informational pop-up window when you select OK if the item has no primary location (for example, the item has been liquidated and sold through a retail outlet), and if the [Display "No Primary Location" Message in Returns \(G46\)](#) system control value is selected.

Exchanging an Item in Order Entry

Use these steps when the customer is returning an item and wants you to send a different item.

1. At the [Select Customer Sold To For Order Screen](#) in Order Entry, select the customer who is returning the item.
2. Complete the [Work with Order Screen](#).
3. Enter the code for the item being returned at the [Work with Order Lines Screen \(Adding Items to the Order\)](#).
4. At the *Qty* field, enter the number of units of the item being returned. Make sure to enter this number as a negative number to process a return.
5. Optionally, at the *Price* field, enter the price at which the item was sold to the customer. This is the amount you will credit to the customer. This can be different from the current price of the item.
6. At the *Ovr* field, enter the reason code for overriding the price of the item, if needed.
7. Select OK. The [Enter Return/Exchange Reason Window](#) opens. At this window, you must tell the system how to process the returned item and identify the reason for the item exchange.
8. At the *Exchange reason* field, enter the reason code for the exchange.
9. At the *Return disposition* field, enter the return disposition code for the return. The Default Disposition Code (C18) defaults here, but you can override it.
10. An error message indicates if you do not have authority to the return disposition value: *User Does not have authority to return disposition code.*
11. Enter the code for the warehouse and location to which the item is being returned. These fields default from the Item or SKU table, or from the return disposition code, but you can override them.
12. Optionally, deselect the *Refund duty* field if you do not want to refund any duty for the item. This field defaults to selected.
13. Select OK. The item is added to the new order with a negative quantity and a negative dollar amount. This means that you are posting a return and crediting the customer.
14. Enter the code for the item that the customer wants to order, using a positive quantity.
15. Optionally, select Payments to add a payment to the order if the new item is more expensive than the item being returned. If the new item is less expensive, the customer will be refunded the difference when you process refunds.

The system displays an informational pop-up window when you select OK if the item has no primary location (for example, the item has been liquidated and sold through a retail outlet), and if the [Display "No Primary Location" Message in Returns \(G46\)](#) system control value is selected.

Refunding extra charges: To credit the customer for shipping, handling or other types of charges on the returned item.

1. Select Charges to display the [Enter Additional Charges Window](#).
2. At the *Add'l chg code* field, select the appropriate additional charge code.
3. Enter the dollar amount in the *Amount* field.
4. Select OK. The *Chg* field in the order totals is updated with these credits.

Changing payment information: If the purpose of entering the return is to credit the credit card for the full amount of the item.

1. Enter the return; see [Returning an Item in Order Entry](#).
2. Select Payments to display the [Enter Payment Method Screen](#).
3. Select the appropriate code for the credit card you want to credit.
4. Complete the payment information by typing the credit card number, expiration date, authorization number, and authorization date.
5. Select OK, then Accept to accept the order.

Entering Customer Memberships in Order Entry

Purpose: You can create a standard membership or a discount-only membership for a customer through order entry by adding an item flagged as a membership (the *Membership* field for the item = Selected) to an order.

Standard membership programs allow you to generate orders periodically. Each order can include the same item(s) or differing items; additionally, you can specify monthly shipments or a different interval. For example, you could set up a membership program that ships a pound of coffee each month, or a different food item each month for 12 months. Membership programs can also include a discount percentage, which applies to all orders placed by the customer. Alternatively, you can set up a membership that does not create orders and only applies the discount percentage to the customer's orders.

Quotes: You can also create a standard customer membership in quote entry. The system performs the same updates as it would when you create a customer membership in order entry; however, the system creates the customer membership in an inactive status and does not update the status to active until you convert the quote to an order. See [Entering Customer Memberships in Quote Entry](#) for more information.

Identifying the standard membership program: When you enter a membership item in order entry, a window opens for you to specify the membership program the customer wants.

Simplify membership entry: You can simplify adding a customer membership in order entry by using the same name for the membership item and the membership program ID. For example, you can name both the membership program and name the membership item MEMB01; when an operator enter the item MEMB01 in order entry, the membership ID MEMB01 defaults in the pop-up window.

Overriding membership defaults: When you add a standard customer membership in order entry, you can accept the default settings from the membership program or override them. For example, a membership program might specify monthly shipments, but you can override this setting to generate orders every other month.

You can override the information that defaults from the membership program only if the membership type permits it.

Soldout membership: If the membership item is soldout, the system updates the status of the order line to S (Soldout) and does not display the Membership window. If the membership item is sold out, the system does not generate a customer membership.

Order message: If the [Write Order Messages for Membership Rotation \(K04\)](#) system control value is selected, the system writes an order message indicating the description of the membership program and the first date when it is eligible for order generation. This order message is flagged to print on the pick slip. See the system control value for more information.

Loyalty memberships: You cannot create a loyalty customer membership in order entry; instead, the background jobs create or deactivate loyalty memberships based on order activity. See [Loyalty Memberships](#) for an overview.

In this topic:

- [Enter Membership ID Window \(Selecting a Membership Program\)](#)
- [Customer Membership Details Screen \(Overriding Customer Membership Defaults\)](#)
- [Information that Defaults from the Order to the Customer Membership](#)
- [Discount Applied Window \(Membership has a Discount Percentage\)](#)
- [Order Total Window \(Reviewing the First Order Total\)](#)
- [Specifying a Cash Amount for the Membership](#)
- [Additional Information on Memberships in Order Entry](#)

Enter Membership ID Window (Selecting a Membership Program)

Purpose: Use this window to select a standard membership program for the customer.

How to display this screen: Add a membership item to an order or quote at the [Work with Order Lines Screen \(Adding Items to the Order\)](#). A membership item is an item whose *Membership* field is selected. See [Performing Initial Item Entry \(MITM\)](#), for more information on setting up membership items.

Membership ID field: If the membership item you entered has the same name as a membership program ID, the matching membership ID defaults. Otherwise, you will need to enter or select a membership program ID. The membership ID is a 12-position, alphanumeric field; it is defined in and validated against the Membership Program table. See [Working with Membership Programs \(WWMP\)](#).

Instructions:

1. Enter the ID for the membership the customer is ordering, or override the default if desired.
2. Select OK. The system validates your entry and highlights the *Membership ID* field if you need to correct it. Correct the field if necessary and select OK again.



Note:

You cannot enter a membership ID for a loyalty membership program. See [Loyalty Memberships](#) for an overview.

3. To create a customer membership using all defaults from the membership program, select Accept. To override any of the defaults from the membership program, or to review the membership settings, select View/Edit. Otherwise, select Exit to cancel adding the membership to the order.

The particular information that you can override depends on the membership program type. If the membership type prohibits overrides, you will be able to change only the payment and shipment information.

If you accept without overrides: The system adds the membership item to the order and creates the customer membership.

To make any changes to the membership, including canceling it:

- in quote or order entry: select Options to advance to the Display More Options screen, and select Customer Memberships. See [Displaying More Options in OIOM](#).
- separate menu option: use the Work with Customer Memberships menu option. See [Working with Customer Memberships \(WWCM\)](#).

If you choose to override it: You advance to the [Customer Membership Details Screen \(Overriding Customer Membership Defaults\)](#). From this screen, you can:

- add or change items to include in the membership
- advance to the Customer Membership screen in Change mode, where you can work with shipment intervals, discounts, pay type information, shipping address, and other header-level settings.

The types of changes you can make are controlled by the membership program type. See [Customer Membership Details Screen \(Overriding Customer Membership Defaults\)](#).

If you select Exit: The system does not create the customer membership, and the membership item is not added to the order. You can select Delete for the membership item to delete it.

Customer Membership Details Screen (Overriding Customer Membership Defaults)

Purpose: Use this screen to change any items that have defaulted from the membership program to the customer membership, or to add items.

You can also advance from this screen to the Customer Membership screen in Change mode, where you can work with shipment intervals, discounts, pay type information, shipping address, and other header-level settings.

How to display this screen: Select View/Edit at the [Enter Membership ID Window \(Selecting a Membership Program\)](#).

You can change information on this screen only if the membership program's type allows changes; otherwise, each field is display-only. See [Working with Membership Programs \(WWMP\)](#).

About this screen: See [Working with Customer Memberships \(WWCM\)](#) for more information on this screen and on changing customer memberships.

Information that Defaults from the Order to the Customer Membership

Paytype: The paytype from the order defaults to the customer membership. This default occurs after you accept the order.

A cash or check pay type will default to the customer membership only if there is not a “catch-all” pay type on the order as well; in any other situation, the “catch-all” will always default to the membership.

If you enter paytype information for the customer membership, the paytype from the order does not override it.

If there is more than one membership on the order, the pay type information defaults to the first membership only. You will not be able to generate any orders for the second membership unless you update the membership directly.

Recipient: If you enter a recipient address by selecting Sold To/Recip or Accept/Add Rcp in order entry, the system defaults the recipient customer's number to the customer membership. However, if you also enter an alternate address for the customer membership, the system uses this address.

If you enter multiple recipients using Accept/Add Rcp, and order a membership item for each recipient, the system creates a separate customer membership for each. However, if you do not enter payment information before pressing Accept/Add Rcp to advance to the next recipient, the payment method will apply to the first membership you create only.

You cannot select a ship-to address for a recipient customer in order entry.

Alternate address, no default: If you enter an alternate address by selecting Order Ship To in order entry, this address does NOT default to the customer membership; this is an order-level address only. You need to enter any alternate address on the membership itself.

Customer ship-to: If you select Cust Ship To to select a ship-to customer in order entry, this ship-to number defaults to the customer membership. When you review the customer membership, you will see that the sold-to customer number appears in the *Recipient #* field, because the ship-to number on a customer membership refers to the recipient customer number (unlike order entry). The system ensures that the correct ship-to number is assigned to the customer membership by defaulting the sold-to customer number in the membership *Recipient #* field.

Even if there is a recipient for the membership, any discount defined for the membership applies to the customer who places the order.

Ship via: If there is no Ship via specified for the membership program at the [Membership Program Screen](#), the system defaults the current ship via on the order header to the customer membership. If you subsequently change the ship via on the order header, or if the system overrides the ship via for the order automatically, it does not automatically change the ship via on the customer membership. See [Ship Via Override Hierarchy](#) for more information on how the system might override the ship via on the order header.

See Working with Customer Memberships (WWCM).

Discount Applied Window (Membership has a Discount Percentage)

Purpose: If you enter a membership that includes a discount percentage, that percentage defaults to the order header whenever the customer places an order, including the current order in which you are entering the membership itself. As a result, the system displays a window immediately after you enter the membership:

If more than one membership discount: If you enter more than one membership that includes a discount on the same order, the discount percentage from the first membership you enter defaults to the order header and applies to the current order. The second (or subsequent) membership discount for the sold-to customer does not apply to the order on which you enter it; however, on any subsequent orders, the system selects the highest membership discount percentage to default onto the order header.

Example: You enter an order for membership MEMB01, which includes a 10% discount, and membership MEMB02, which includes a 15% discount. Since you enter MEMB01 first, a 10% discount applies to the current order. However, when you enter any subsequent orders for the sold-to customer, a 15% discount defaults to the order header as long as the MEMB02 is active.

Additional repricing and discounts may also apply, depending on the pricing values and special offers you have set up in your company.

Applies to sold-to customer only: Any discount percentage applies only to the customer who places the order, not the recipient of the order and membership.

Order Total Window (Reviewing the First Order Total)

Purpose: Use this window to review the estimated dollar total of the first order you will generate for the membership.

How to display this screen: Select Accept to accept the order if the [Display First Membership Order Total \(G14\)](#) system control value is selected. If the order was prepaid, this window opens after you have entered a cash amount for the membership. For quotes, this window does not display until you convert the quote to an order and select Accept to accept the order.

Quotes: This window does not display until you convert a quote to an order and select Accept.

About this window: This window indicates the next rotation eligible for order generation. When you review this window in order entry, the rotation will always be 1.

Order total an estimate: The order total that appears in this window includes merchandise and tax. It also includes projected freight charges if the ship via on the order does not match the [Best Way Ship Via for Auto-Assignment \(J67\)](#). This order total is an estimate only. The actual order total when you generate the first order may vary, depending on changes to pricing, using various freight methods, including special charges, and so on.

Specifying a Cash Amount for the Membership

Purpose: When you create a customer membership by entering a prepaid order, you can specify the amount of the prepayment to apply to orders you will generate for the membership. Only cash or checks (payment category 1) can apply to memberships. See [Working with Pay Types \(WPAY\)](#).

When you first enter a prepayment amount that is greater than the current order total, the system displays a message:

```
Order total not equal to paid amount.
```

Select OK to confirm the prepayment amount.

Cash Amount for Membership Window

Allocate cash for membership: When you accept the order, the system displays this window for you to specify the amount of the prepayment to apply to orders you will generate for the customer membership, rather than the current order:

The amount of the prepayment defaults. Enter the amount that should apply toward orders generated for the membership; the remaining amount will be available to pay for the current order.

For example, the customer sent a check for \$50.00, and the current order total is \$20.00. You would enter \$30.00 in the window to apply \$30.00 to the membership, and leave \$20.00 to apply to the current order.

The system allows you to enter any amount, as long as it is not more than the payment method amount. However, when you generate the first order for the membership, it will go on hold because of a balance due if the cash amount is insufficient.

Amount remaining toward current order: Any amount you do not apply to the customer membership is applied to the current order. If this amount is less than the current order total (and if there is not another, sufficient payment method on the order) the order will go on hold. If this amount is more than the current order total, the system will generate a refund.

If more than one prepayment method: When entering more than one prepayment method on the order, you should enter the prepayment method that should apply to the membership first. If there is more than one prepayment method on the order, the amount of the first prepayment defaults in the window. You will not be able to enter an amount greater than this first prepayment method.

For example, a customer sends a check for \$10.00 and a check for \$60.00. The order total is \$20.00. When you are entering the payment information on the current order, you should enter the \$60.00 check first, so that the Cash Amount for Membership window defaults to \$60.00; this way, you can apply \$50.00 to the membership and leave \$20.00 for the current order. If you entered the \$10.00 check first, then \$10.00 would default in the window, and you would not be able to enter an amount greater than \$10.00; the system would create a refund for the remaining \$40.00 from the \$60.00 check as an overpayment.

Review payment in order inquiry: When you review payment information for the order in standard or streamlined order inquiry, the amount of the payment method will equal the difference between the original prepayment amount and the amount applied to the membership.

For example, if the customer sent a check for \$100.00, and you applied \$80.00 to the membership, the payment amount on the order appears in order inquiry as \$20.00.

You can review payment information in standard or streamlined order inquiry by selecting Payments. See [Reviewing Financial Information on an Order](#).

Order history message: The system writes a message to Order History when you apply a prepayment amount to a customer membership.

```
3/30/06 M Cash applied to membership(MEMB01) 10.00 EJOHNSON
```

The membership ID appears in parentheses.

You can review this message in standard order inquiry by selecting Order History and in streamlined order inquiry by selecting History. See [Display Order History Screen](#).

If more than one membership on the order: If you enter a prepaid order that includes more than one membership, the cash amount posts to the first membership on the order only.

Additional Information on Memberships in Order Entry

Please note these guidelines regarding creating customer memberships through order entry:

Deleting/rejecting the membership:

- Deleting the membership item from a quote also deletes the customer membership. When you select Delete for a membership item to delete it during quote entry, the system will not create the customer membership. When you select Delete for a membership item to delete it during quote maintenance, the system deletes the customer membership. See [Entering Customer Memberships in Quote Entry](#).
- Deleting the membership item from an order does not cancel the customer membership. If you select Delete for a membership item to delete it, the customer membership will still exist, and will generate orders to the customer. To delete or cancel the membership:
 - Use the Work with Customer Memberships menu option (fast path = WWCM), or
 - Select Options in order entry to advance to the Display More Options screen, and select Customer Membership.

To delete immediately: If you select View/Edit at the [Enter Membership ID Window \(Selecting a Membership Program\)](#), you can then select Header at the [Customer Membership Details Screen \(Overriding Customer Membership Defaults\)](#), and finally, select Reject at the Customer

Membership screen to delete the membership. However, you can only follow these steps while you are first entering the membership item.

Rejecting the order deletes the customer membership. If you reject the entire order or quote, the system deletes the customer membership as well.

Entering multiple memberships: *When entering the membership item, do not use a quantity greater than one.* Each time you enter a membership item, you can create only one customer membership, regardless of the item quantity you enter. To create two memberships with different recipients or shipping addresses, enter the same membership item twice.

If you enter more than one membership on an order, the pay type from the order defaults to the first membership only. You must enter pay type information for the second membership.

Additional considerations:

- Changing a customer membership: *A membership can be assigned to a type that does not permit changes.* If a membership program's type prohibits changes, you will not be able to override any of the settings that default from the program for an individual customer membership. For example, you will not be able to add or change any items, or change the shipment intervals.
- Discount applied to membership item? *If the membership includes a discount, the price of the membership itself will be discounted unless you flag the item.* You should deselect the *Discountable* field for the item to prevent the price of the membership from being discounted.
- If the membership item is the only item on the order: *In this situation, the order will be closed the next time you generate pick slips (provided the credit card on the order, if any, passes authorization).*
- Working with a membership during order entry but after adding it to the order: *To work with the membership during order entry, but after you have selected Accept to add it,* select Options to advance to the [Display More Options Screen](#). and select Customer Memberships.
- “Best way” ship via override: If the ship via for the membership matches the [Best Way Ship Via for Auto-Assignment \(J67\)](#), the system automatically assigns the “best way” ship via with the lowest overall shipping charges when generating a membership order. See that system control value for more information.
- Order message: If the customer membership is not discount-only (that is, if there are items specified to include on generated orders) and if the Write Order Messages for Membership Rotation (K04) system control value is selected, the system writes an order message indicating the description of the membership program and the first date when it is eligible for order generation. This order message is flagged to print on the pick slip. See that system control value for more information.

Entering Coupon Promotions on an Order

Purpose: Use the [Coupon Discount Window](#) to work with coupon promotions that provide dollar or percentage discounts on an order or order detail line. Unlike the discount amounts that you can enter at the [Enter Coupon Discount Amount Window](#), coupon promotions can be restricted to particular source codes, offers, or qualifying items. There are two types of coupons:

- order-level (Coupon type = O): the discount applies to all eligible order detail lines.
- detail-level (Coupon type = D): the discount applies to the selected order detail line only.

You can use the Coupon Discount window to:

If you advance to the window by selecting Coupons for an order line:

- add an order-level coupon
- add a detail-level coupon to the item on the order line
- delete an order-level coupon
- delete a detail-level coupon that was applied to the item on the order line
- review order-level coupons
- review detail-level coupons applied to the item on the order line
- automatically reprice the order and apply order-level and detail-level coupon discounts if the [Automatically Reprice Coupon \(K02\)](#) system control value is selected

See [Selecting an Item \(Working with Order-Level and Detail-Level Coupons\)](#).

If you advance to the window by selecting Reprice in order entry/maintenance:

- add an order-level coupon
- delete an order-level coupon
- review order-level coupons
- apply order-level and detail-level coupon discounts to all eligible items

See [Selecting Reprice \(Working with Order-Level Coupons\)](#).

Restrictions and requirements for displaying this window:

- This window is available only when the Price method for the source code on the order header is set to D (regular plus reprice) and you have created one or more coupons through [Working with Coupon Promotions \(WCPR\)](#).
- In standard order inquiry, you can review coupons but not make any changes.
- You cannot make any changes to the coupons on an order if any of the order detail lines has a printed pick, or is in a closed (X) status.
- The system applies any changes you enter in order maintenance only if you have the [Price Tables \(E07\)](#) system control value at the [Pricing Values \(B31\)](#) screen selected.

For more information: See [Working with Coupon Promotions \(WCPR\)](#) for an overview on how coupon promotions work, and information on how to set up coupon promotions. Also, see [Order Repricing, Premiums, Discounts, and Promotions](#) for information on the windows and screens that open in order entry when you select the Reprice option.

In this topic:

- [Coupon Discount Window](#)
- [Selecting an Item \(Working with Order-Level and Detail-Level Coupons\)](#)
- [Selecting Reprice \(Working with Order-Level Coupons\)](#)
- [Understanding Coupon Error Messages in Order Entry](#)
- [Understanding Coupon Error Messages through the Order API](#)

Coupon Discount Window**How to display this window:**

- Select Coupons for an item at the:
 - [Work with Order Lines Screen \(Adding Items to the Order\)](#) in order entry (header format) or the [Work with Order Lines Screen](#) in order maintenance
 - [Scan Order Lines Screen](#) in order entry or order maintenance
 - [Order Inquiry Detail Screen](#) (standard order inquiry)

- Select Reprice at the [Work with Order Lines Screen \(Adding Items to the Order\)](#) if there are any order-level coupon promotions in your company. When you advance to the window by selecting Reprice, it displays only order-level coupons.

The methods of displaying the window in order entry differ in that:

Selecting Coupons for an Item	Selecting Reprice
You can enter and review both order-level coupons (which apply to each eligible item on the order) or detail-level coupons (which apply only to the selected item)	You can enter order-level coupons only
The system automatically reprices the order and applies coupon discounts at this time only if the Automatically Reprice Coupon (K02) system control value is selected.	The system applies coupon discounts at this time

Field	Description
Item	The item on the order detail line that the coupon applies to; displayed only when you advance to the window by selecting Coupons for an item. <i>Alphanumeric, 12 positions; display-only.</i>
SKU	The item's unique characteristics, such as its color or style; displayed only when you advance to the window by selecting Coupons for an item. <i>Alphanumeric, three 4-position fields; display-only.</i>
Description	The description of the item or SKU; displayed only when you advance to the window by selecting Coupons for an item. <i>Alphanumeric, 120 positions; display-only.</i>
Coupon code	The code that identifies the coupon applied to the order or order detail line. To add a coupon, enter the code here. You can also prompt to display a list of existing coupons in your company, and select a coupon from the list. <i>Alphanumeric, 6 positions; optional.</i>
Coupon description	The description of the coupon, truncated from 45 positions. <i>Alphanumeric, 30 positions; display-only.</i>
Ord Det (Order or Detail level coupon)	Indicates whether this is an order-level or detail-level coupon. Valid values are: • O = applies to all applicable items on the order • D = applies only to a specific item on the order <i>Display-only.</i>
Discount Type (Unlabeled field after <i>Ord Det</i>)	Indicates the type of the discount for the coupon; the amount of each discount displays in the <i>Discount</i> field: • D = Coupon applies the dollar discount indicated in the <i>Discount</i> field; if this is an order-level coupon, the total dollar discount applies to the eligible order detail line with the highest unit price; if this is a detail-level coupon, the total dollar discount applies to this order line. The total discount amount is prorated against the quantity of the order line. • % = Coupon applies the percentage discount indicated in the <i>Discount</i> field to the eligible items on the order (order-level coupons) or the order detail line (detail-level coupons) <i>Alphanumeric, 1 position; display-only.</i>

Field	Description
Discount	Indicates the amount of the discount. - If the <i>Discount type</i> is D, this is the dollar discount for the coupon; if this is an order-level coupon, the total dollar discount applies to the eligible order detail line with the highest unit price; if this is a detail-level coupon, the total dollar discount applies to this order line. The total discount amount is prorated against the quantity of the order line. - If the <i>Discount type</i> is %, this is the percentage discount for the coupon to apply to the eligible items on the order (order-level coupons) or the order detail line (detail-level coupons) <i>Numeric, 13 positions with a 2-place decimal; display-only.</i>
Disc seq #	Indicates the sequence in which to apply this coupon compared with other coupons for the same order or detail line. Coupons with lower sequence numbers apply first. The system uses all of the following information when determining the sequence in which to apply coupons: - Detail-level coupons always apply before order-level coupons. - Next, the system checks this sequence number. The coupon with the lower sequence number applies first. - Finally, if two coupons have the same sequence number, the first coupon alphanumerically, based on the coupon code, applies first. <i>Numeric, 5 positions; required.</i>

Selecting an Item (Working with Order-Level and Detail-Level Coupons)

When you display the window by selecting Coupons for an item, you can review or work with order-level and detail-level coupons. See [Selecting Reprice \(Working with Order-Level Coupons\)](#) for an alternate method of displaying the window.

To apply a coupon to the order or order detail line: Enter the coupon code. You can also prompt to display a list of existing coupons in your company, and select a coupon from the list. When you add a coupon:

- If you enter a detail-level coupon, it applies to that order detail line only.
- If you enter an order-level coupon, it applies to any eligible line on the order.

See [How an Order or Item Qualifies for a Coupon](#).

If the order or detail line does not qualify for the selected coupon, or if there is any other problem, the system displays an error message; see [Understanding Coupon Error Messages in Order Entry](#) for more information. Otherwise, the coupon is added to the detail line or all eligible detail lines, as appropriate, and displayed in the window.

Reviewing coupons: When you use this method to display the window, it includes:

- all order-level coupons applied to the order
- all detail-level coupons applied to this order detail line

Deleting a coupon: Select Delete for a coupon to delete it from the order or detail line.

**Note:**

You cannot add or delete a coupon at this window if any item on the order has a printed pick slip or is in closed (X) status.

Click Accept or Exit to confirm your entries when you are done.

Canceling an item: Order-level dollar discount coupons apply the total dollar discount to the item on the order with the highest single-unit offer price. If you cancel this item, the system moves the discount to the item with the next highest single-unit price if the order is still eligible for the coupon.

When are the discounts applied? The setting of the Automatically Reprice Coupon (K02) system control value controls when the system applies the discounts to the order.

- If selected, the system applies order-level and detail-level coupon discounts and validates the order dollar minimum when you select Accept or Exit at the [Coupon Discount Window](#), select Reprice, and when you accept the order.
- If unselected, the system applies order-level and detail-level coupon discounts and validates the order dollar minimum when you select Reprice and when you accept the order.

For more information: See Working with Coupon Promotions (WCPR) for an overview on how coupon discounts work, including examples and setup instructions.

Selecting Reprice (Working with Order-Level Coupons)

When you display the window by selecting Reprice at the [Work with Order Lines Screen \(Adding Items to the Order\)](#), you can review or work with order-level coupons only. See [Selecting an Item \(Working with Order-Level and Detail-Level Coupons\)](#) for an alternate method of displaying the window.

Completing this window: You can add, review, or delete order-level coupons; see [Selecting an Item \(Working with Order-Level and Detail-Level Coupons\)](#) for instructions. Click Accept or Exit to confirm your entries when you are done. The system validates that the order meets any order dollar minimum requirement, and applies all eligible coupon discounts, including discounts for detail-level coupons.

To recalculate item prices and order totals:

- If the Automatically Reprice Coupon (K02) system control value is unselected, each time you add or delete a coupon by selecting an item on the order, you will need to select Reprice again and then click Accept or Exit at the window to see the effect of your entries.
- If the Automatically Reprice Coupon (K02) system control value is selected, each time you add or delete a coupon by selecting an item on the order and select Accept or Exit at the Coupon Discount window, the system automatically recalculates the item prices and order totals.

For more information:

- See Working with Coupon Promotions (WCPR) for an overview on how coupon discounts work, including examples and setup instructions.
- See [Order Repricing, Premiums, Discounts, and Promotions](#), particularly the [Repricing Screen Flow](#), for more information on the other windows that may display when you perform repricing.

Understanding Coupon Error Messages in Order Entry

The following error messages are possible during order entry if there is an error related to a coupon you are trying to apply to the order.

Error Message	Explanation
% discount not allowed.	You have tried to apply a detail-level percentage discount to an item that is restricted from percentage discounts, as specified through the Work with Coupon Item Restriction Screen ; or, you have tried to apply a percentage discount to an order, and all of the items on the order are restricted.
At least one item is restricted from this coupon.	You have applied an order-level percentage discount to an order that includes an item that is restricted from percentage discounts, as set up through the Work with Coupon Item Restriction Screen . This discount will not apply to the restricted item; however, the discount will apply to any other eligible items on the order.
Coupon cannot be used with existing offer.	The coupon has an offer restriction (the Offer requirement field is selected), and the offer associated with the source code on the order header is not specified through the Work with Coupon Offer Requirement Screen . You cannot apply the coupon to this order.
Coupon cannot be used with existing source.	The coupon has a source code restriction (the Source requirement field is selected), and the source code on the order is not specified through the Work with Coupon Source Requirement Screen . You cannot apply the coupon to this order.
Coupon code entered is invalid.	The coupon code you entered is not a valid coupon in your company. Check your spelling, or prompt to display a list of coupons.
Coupon is not currently active.	The current date is earlier than the Start date or later than the End date for the coupon. You cannot apply this coupon at this time.
Coupon item requirement(s) have not been met.	The coupon has an item requirement (indicated by the Item requirement field), and the item on the order detail line does not match an item specified through the Work with Coupon Item Requirement Screen; or, if this is an order-level coupon with an item requirement, all of the required items are not on the order. - For detail-level coupons: you cannot apply the coupon to this item. - For order-level coupons: you cannot apply the coupon to this order without adding all required items.
Coupon may not be used with a conflicting coupon.	The coupon has a restriction against use with another coupon that is on the order (the Coupon restriction field is selected, and there is another coupon on the order that has a coupon restriction for this coupon as specified through the Work with Coupon Restriction Screen). You cannot apply both of these coupons on the same order.
Coupon may not be used with non-discountable item.	The item you have selected, or all items on the order, have the Discountable field in the Item table unselected. You cannot apply a coupon against this item (or order, if all items are non-discountable).
Coupon type must be 'O' or 'D'	The Coupon type is not set to Order Level or Detail Level. You cannot apply the coupon to an order until this field is set to one of the valid values.
Detail coupon must be entered for specific item.	You have displayed the Coupon Discount window by selecting Reprice at the Work with Order Lines Screen (Adding Items to the Order) , and then attempted to enter a detail-level coupon. Only order-level coupons are accessible when you display the window this way. You need to display the window by selecting Coupons for an item and applying the coupon to the selected item.

Error Message	Explanation
Detail coupon not allowed - item is sold out.	You have tried to enter a detail-level coupon against an item that is soldout.
Duplicate coupon not allowed.	You have tried to apply the same order-level coupon twice to a single order.
Item price is less than coupon requirement.	The coupon has an order detail line total requirement (indicated by the Minimum detail \$ amt field), and the regular offer price of the item is less than this minimum. You cannot apply the coupon to this item.
No coupon maintenance allowed. Order has picks.	Once you have printed a pick slip for any item you can no longer add or delete coupons for the order.
No coupon maintenance allowed. Order must have only open lines.	You cannot add or delete coupons if any item on the order has a status of closed (X).
Order Detail Coupon already exists.	You have tried to apply the same detail-level coupon twice on a single order detail line. It is possible to apply a coupon to more than one order detail line on an order if it is a detail-level coupon (the Coupon type is D). Also, the system applies an order-level coupon (the Coupon type is O) automatically to each eligible detail line on the order.
Order total is less than coupon requirement.	The coupon has an order total requirement (indicated by the Minimum order \$ amt field), and the merchandise total on the order is less than this minimum. You cannot apply the coupon to this order unless you add more merchandise. Non-discountable items (the Discountable field in the Item table is unselected) are not included in the merchandise dollar total for the purposes of meeting this minimum. See How an Order or Item Qualifies for a Coupon .

Understanding Coupon Error Messages through the Order API

The CWOOrderOut response message might include coupon-related errors when the system receives an inbound order message (CWOOrderIn) that includes a header-level or detail-level coupon and the *response_type* specified in the inbound message is E.

If it is possible to correct the error, the correction is indicated below. In all other cases, the customer cannot apply the coupon to the order, and the order remains in error status until you edit it in batch order entry.



Note:

The system does not put an order in message if the CWOOrderIn message includes the same coupon code twice; instead, it just creates the order and applies the coupon once, assuming that the order qualifies. Also, the system does not put an order in error if the message includes an order-level percentage discount coupon and there are any restricted items on the order as specified through the Work with Coupon Item Restriction Screen, provided that there is at least one unrestricted item.

For more information: See *Generic Order Interface (Order API)*.

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

Code	Error	Explanation
55	Invalid Cpn Code	The coupon code you entered is not a valid coupon in your company. The customer cannot apply this coupon to an order.
56	Cpn Not Active	The current date is earlier than the Start date or later than the End date for the coupon. The customer cannot apply this coupon at this time.
58	Offer Restricted	The coupon has an offer restriction (the Offer requirement field is selected), and the offer associated with the source code on the order header is not specified through the Work with Coupon Offer Requirement Screen . The customer cannot apply the coupon to this order.
59	Invalid Src Requirement	The coupon has a source code restriction (the Source requirement field is selected), and the source code on the order is not specified through the Work with Coupon Source Requirement Screen. The customer cannot apply the coupon to this order.
60	Cpn Restricted	The coupon has a restriction against use with another coupon that is on the order (the Coupon restriction field is selected, and there is another coupon on the order that has a coupon restriction for this coupon as specified through the Work with Coupon Restriction Screen). The customer cannot apply both of these coupons on the same order.
61	% discount not allowed	The customer has tried to apply a detail-level percentage discount to an item that is restricted from percentage discounts, as specified through the Work with Coupon Item Restriction Screen; or, the customer tried to apply a percentage discount to an order, and all of the items on the order are restricted.
62	Order Tot < Cpn Requires	The coupon has an order total requirement (indicated by the Minimum order \$ amt field), and the merchandise total on the order is less than this minimum. The customer cannot apply the coupon to this order without adding more merchandise. Non-discountable items (the Discountable field in the Item table is unselected) are not included in the merchandise dollar total for the purposes of meeting this minimum. See How an Order or Item Qualifies for a Coupon.
63	Cpn Item Required	The coupon has an item requirement (indicated by the Item requirement field), and the item on the order detail line does not match an item specified through the Work with Coupon Item Requirement Screen; or, if this is an order-level coupon with an item requirement, all of the required items are not on the order. • For detail-level coupons: the customer cannot apply the coupon to this item. • For order-level coupons: the customer cannot apply the coupon to this order without adding all required items.

Code	Error	Explanation
64	Detail \$ < Required	The coupon has an order detail line total requirement (indicated by the Minimum detail \$ amt field), and the regular offer price of the item is less than this minimum. The customer cannot apply the coupon to this item.
65	Non-Disc Item	The item that the customer selected has the <i>Discountable</i> field in the Item table unselected. The customer cannot apply a coupon against this item.
77	No Discountable Items	All items on the order have the <i>Discountable</i> field in the Item table unselected. The customer cannot apply a coupon against this order.

 Note:

The response does not return this error if other conditions prevent the coupon from applying to the order (for example, if one item on the order is non-discountable and the other item is sold out).

78	Cpn Not Allowed-Item S/O	The customer has tried to enter a detail-level coupon against an item that is soldout.
80	Dtl Cpn Passed at Ord Lvl	The message includes a detail coupon (<i>Type</i> = D) in the <i>coupon_code</i> attribute of the <i>Coupon</i> element, which should be used for header coupons (<i>Type</i> = O). To apply a detail coupon, the message should use the <i>coupon_detail_code</i> attribute of the <i>CouponDetail</i> element.

 Note:

There is no edit against passing an order-level coupon at the detail level; the system still applies the coupon discount to the order if the order qualifies.

Working with an Order-Level Email Address

Purpose: The system stores an email address for each order you create. The order-level email address is separate from the email addresses maintained for the customer sold to, permanent ship-to customer, or other email addresses in the system.

In this topic:

- [Email Address Updates through Interactive Order Entry](#)
- [Email Address Updates through the Generic Order Interface](#)

- [Email Address Updates through Order Maintenance](#)
- [Email Address Assignment through Membership Generation](#)
- [Email Address Updates Summary](#)

Email Address Updates through Interactive Order Entry

How the order-level email address defaults: The system uses the following hierarchy to default the order-level [Email](#) address in order entry:

- If the customer sold-to has a primary email address, use that email address; otherwise,
- No order-level email address defaults in order entry.

You can accept the default, enter a different email address, or clear the email address.



Note:

If you clear the email address and the [Suppress Email Address Search \(J09\)](#) system control value is selected, the system does not generate order-related emails for the order. See that system control value for more information.

Accepting the order-level email address: When you click OK, the system:

- saves the [Email](#) address as the order-level email address
- if the customer sold-to does not already have a primary email address, saves the *Email address* as the primary email address; the *Opt-in/opt-out* value specified at the order entry screen defaults to the *Opt-in/opt-out* setting for the customer
- if the *Email address* is not already in the Customer Sold To Email Address table but the customer does have a primary email address, saves the new email address and the *Opt-in/opt-out* setting as an additional email address for the customer, but does not change the customer's primary email address

The system does not update the individual email address or opt-in/out setting based on your entry; instead, if the individual's email address defaulted, this email address is now added to the Customer Sold To Email Address table for the sold-to customer, along with the specified opt-in/out value. If you cleared the email address in order entry and the Suppress Email Address Search (J09) system control value is selected, the system does not update the Customer Sold To Email Address table or the sold-to customer; it simply does not store an email address at the order level.

Changing the primary email address: To change the sold-to customer's primary email address, place the cursor in the *Email address* field and click on the arrow to display the [Select Customer Email Address Screen](#). At this screen, you can flag an email address as the primary address or delete an outdated address. You can also advance to this screen by prompting on the *Email* field at the [Expand Name/Address Screen](#).

Updating the opt-in/out setting: Unlike the email address, the opt-in/out setting is not stored on the order. When you update the *OptIn* setting in order entry, the system updates the email address for the customer that matches the email address on the order as follows:

- If the order-level email address is the same as the customer's primary email address, or if there is no order-level email address, the system updates the [Opt in/Opt out](#) setting for the sold-to customer and the [Opt in/out](#) setting for the Customer Sold To Email Address record.
- Otherwise, the system updates just the [Opt in/out](#) setting for the matching Customer Sold To Email Address record.

Recipient or gift orders: The email address and opt-in/out setting are associated with the customer who places the order, not the recipient. When you enter a new email address, the system adds an email address for the customer placing the order; similarly, if you display the [Select Customer Email Address Screen](#) by prompting on the email address, the screen displays email address information for the customer placing the order. To review or work with the recipient's email address or opt-in/out setting, you must advance to the [Expand Name/Address Screen](#).

How to review? The order-level email address is available at the [Work with Order Screen](#) in order entry or maintenance.

**Note:**

The order-level email address, which is stored in the Order Header Extended table, is not available for review through order inquiry.

For more information: See [Working with Customer Email Addresses](#) for more information on the Customer Sold To Email Address table and primary email address.

Email Address Updates through the Generic Order Interface

Selecting the order-level email address: The system uses the following hierarchy in updating the order-level email address when creating orders through the *Generic Order Interface (Order API)*:

- If an *order_email* is specified in the Inbound Order Message, use that email address; otherwise,
- If there is an email address specified for the sold-to customer (either specified in the *sold_to_email* in the message, or the current primary email address for the customer), use that email address; otherwise,
- Leave the order-level email address blank.

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

Updating the customer's primary email address: The system updates the sold-to customer's primary email address and opt-in/out setting only if:

- existing customers: the *sold_to_email_update* is selected and a *sold_to_email* is specified in the message
- new customers: a *sold_to_email* is specified in the message

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

This update occurs regardless of whether the sold-to customer's email address is used as the order-level email address.

Updating the customer's opt-in/out setting: The system always updates the customer's opt-in/out setting if a *sold_to_opt_in* is specified in the message.

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

Email Address Updates through Order Maintenance

Adding an order-level email address: When you enter a new email address in order maintenance, this email address is used as the order-level email address and added to the Customer Sold To Email Address table. In addition, if the previous email address that was defined on the order does not exist in the Customer Sold To Email Address table, the new email address also becomes the new primary email address for the customer if there is not already a primary defined.

Clearing the order-level email address: Clearing the email address in order maintenance removes the order-level email address from the order; however, the address remains in the Customer Sold To Email Address table unless you delete it. You can use the [Work with Customer Email Address Screen](#) or the [Select Customer Email Address Screen](#).

**Note:**

If you clear the email address and the Suppress Email Address Search (J09) system control value is selected, the system does not generate additional order--related emails for the order. See that system control value for more information.

Changing the opt-in/out setting: When you change the opt-in/out flag in order maintenance, the system updates the [Opt in/out](#) in the Customer Sold To Email Address table for the email address that matches the order-level email address. If the order-level email address is the same as the customer's primary email address, the system also updates the [Opt in/Opt out](#) for the sold-to customer. If there is no order-level email address, the system updates the *Opt-in/out* setting for the customer's primary email address, and the matching address in the Customer Sold To Email table.

Recipient or gift orders: The email address and opt-in/out setting are associated with the customer who places the order. When you enter a new email address, the system creates a new email address for the customer placing the order; similarly, if you display the [Select Customer Email Address Screen](#) by prompting on the email address, the screen displays email address information for the customer placing the order. To review or work with the recipient's email address or opt-in/out setting, you must advance to the [Expand Name/Address Screen](#).

Email Address Assignment through Membership Generation

When you generate a membership order through [Generating Membership Orders \(EGMO\)](#), the customer's primary email address, if any, is used as the order-level email address. If the customer does not have a primary email address, then no order-level email address is assigned.

Email Address Updates Summary

The following table summarizes the various methods of specifying an email address for an order, and the related updates that take place. See the individual listings above for more detail.

Order Entry Method	Defaulting Hierarchy	Updates to:	
		Primary Email Address?	Customer Sold To Email Address table?
interactive	Customer sold-to primary email address	Uses order-level email address if the customer does not already have a primary email address	Adds order-level email address

Order Entry Method	Defaulting Hierarchy	Updates to:	
		Primary Email Address?	Customer Sold To Email Address table?
generic order interface	<i>order_email</i> from message - Customer sold-to primary email address For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Only if <i>sold_to_email</i> specified in message, and <i>sold_to_email_update</i> is selected	Adds order-level email address, either <i>order_email</i> or <i>ind_email_address</i>
order maintenance	existing order-level email	Only if the previous email address on the order does not exist in the Customer Sold To Email Address table and a primary is not defined	For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Adds new order-level email address
membership generation	existing customer sold-to primary email address	No	N/A

Valid Ship Vias for Window

Purpose: Use this window to review the ship vias eligible to ship an order, including the projected overall shipping charges and the expected delivery date for each ship via. You can also use this window to select a different ship via for the order.

How are shipping charges calculated? The total *Charges* displayed at this window include:

- Freight charges, based on the *Freight method* for the source code on the order header
- [Add'l freight charge](#)
- shipper/item charges (see [Work with Ship Via/Item Screen](#))
- service charges (see [Work with Dollar Chart by Ship Via Screen \(Ship Via Service Charges\)](#))
- weight charges (see [Work with Weight Charges by Ship Via Screen](#))

The charges also include any special handling charges on the order if the [Include Special Handling in Alternate Shipping Charges by Via \(I03\)](#) system control value is selected.

How is the expected delivery date calculated?

- If the *Arrival date* on the order is later than the *Order date*, then the expected delivery date = the *Arrival date*; otherwise,
- the *Order date* + the [Shipping lead days](#) for the SCF/ship via + number of days specified in the [Pick Processing Days \(B37\)](#) system control value

**Note:**

The expected delivery date is blank if there are no reserved lines on the order.

Will the selected ship via be the one to actually deliver the order? Depending on your setup, the system can override the ship via on the order during the order acceptance process. See the [Ship Via Override Hierarchy](#) for more information on possible overrides.

Note:

- If the [Best Way Ship Via for Auto-Assignment \(J67\)](#) system control value specifies a ship via, this ship via is not listed at this window.
- If there is only one item on the order, and that item has an item/ship via override, then the override ship via (indicated on the order detail line; see the [Display Order Detail Screen \(Reviewing Order Line Detail\)](#)) is used to ship the item, regardless of the ship via code on the order header.

How to display this window: Prompt on the *Ship via* field at the [Work with Order Screen](#) or [Work with Order/Recap Screen](#) in order entry, or the [Work with Order Screen in Order Maintenance](#).

**Note:**

If you advance to this window in order maintenance, the system displays the freight charges for all open lines on the order and does not look at the calculate freight setting for each order line.

Field	Description
Country	The three-letter code identifying the country for the SCF of the order shipping address, as specified in the SCF table. See Working with SCF Codes (WSCF) for information on setting up and working with SCF codes. <i>Alphanumeric, 3 positions; display-only.</i>
SCF	The SCF for the shipping address on the order. <i>Alphanumeric, 3 position; display-only.</i>
Valid states (two unlabeled fields to the right of the SCF)	The valid state(s) for the SCF, as specified in the SCF table. You can specify one or two valid states for each SCF. See Working with SCF Codes (WSCF) for information on setting up and working with SCF codes. <i>Alphanumeric, two 2-position fields; display-only.</i>
Via	A ship via that is eligible to ship the order, based on the existence of an SCF/ship via record. See Working with SCF/Ship Via Values (WSHV) for more information on setting up SCF/ship via records. Selecting a ship via: You can select a ship via at this window to use this ship via for delivery of the order. However, if the system subsequently overrides the ship via, or if there are no order lines without item/ship via overrides, then the ship via you select will not be used. See above for a discussion. If the Best Way Ship Via for Auto-Assignment (J67) system control value specifies a ship via, this ship via is not listed. <i>Numeric, 2 positions; optional.</i>

Field	Description
Description	The description of the ship via, from the Ship Via table. See Working with Ship Via Codes (WVIA) for information on setting up ship vias. <i>Alphanumeric, 30 positions; optional.</i>
Charges	The total charges to ship the order with this ship via, including: • Freight charges, based on the <i>Freight method</i> for the source code on the order header • Add'l freight charge • shipper/item charges (see Work with Ship Via/Item Screen) • service charges (see Work with Dollar Chart by Ship Via Screen (Ship Via Service Charges)) • weight charges (see Weight Charges by Ship Via Screen) The charges also include any special handling charges on the order if the system control value Include Special Handling in Alternate Shipping Charges by Via (I03) system control value is selected. <i>Numeric, 20 positions with a 2-place decimal; display-only.</i>
Exp Delivery Date	The date when the customer can expect to receive the shipment using this ship via, calculated as follows: • If the <i>Arrival date</i> on the order is later than the <i>Order date</i>, then the expected delivery date = the <i>Arrival date</i>; otherwise, • the <i>Order date</i> + the Shipping lead days for the SCF/ship via + number of days specified in the Pick Processing Days (B37) system control value  Note: If there are no reserved lines on the order, then the expected delivery dates for all displayed ship vias are blank. <i>Numeric, 6 positions (in user date format); display-only.</i>

Tracking Order/Call Disposition Activity

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

When is order/call disposition activity tracked? The setting of the [Capture Order/Call Disposition \(K03\)](#) system control value controls when the system captures order/call disposition activity and whether a reject reason is required when you reject an order or terminate a call from an external order call center.

K03 Setting	Description
ORDER	The system creates a record in the Order Disposition Table when you reject an order in interactive Order Entry; see Order Disposition Information Captured for a Rejected Order. In addition, the system requires you to enter an order/call disposition reject reason code at the Confirm Order/Call Disposition Window when you reject an order in interactive Order Entry.

 Note:

Interactive order entry in this situation does not include web orders or membership orders.

Multiple Recipient Orders

If an order contains multiple ship to customers, the system creates one record in the [Order Disposition Table](#) for the order for the first ship to customer. If you reject a ship to customer, but not the order, the system displays the [Confirm Reject Window](#) to confirm that you wish to reject the ship to customer on the order; the system only displays the [Confirm Order/Call Disposition Window](#) if you reject the entire order.

K03 Setting	Description
ALL	The system creates a record in the Order Disposition Table when: • you end a call received from an external order call center that does not result in placing an order; see Order Disposition Information Captured for a Terminated Call. • you accept an order in interactive Order Entry; see Order Disposition Information Captured for an Approved Order. • you reject an order in interactive Order Entry; see Order Disposition Information Captured for a Rejected Order. In addition, the system requires you to enter an order/call disposition reject reason code at the Confirm Order/Call Disposition Window when: • you reject an order in interactive Order Entry. • you end a call received from an external order call center or select Exit at the Select Customer Sold To For Order Screen if a <i>Universal call ID</i> has been captured for the call in the Order Disposition table.  Note: Interactive order entry in this situation does not include web orders or membership orders.
	Identifying a Call from an External Order Call Center The system uses the presences of a <i>Universal call ID</i> defined in the Order Disposition table to determine if a call has been received from an external order call center.  Note: The system does not create a record in the Order Disposition table when you receive a call from an external order call center and immediately select Maintain at the Select Customer Sold To For Order Screen.
	Multiple Recipient Orders If an order contains multiple ship to customers, the system creates one record in the Order Disposition Table for the order for the first ship to customer. If you reject a ship to customer, but not the order, the system displays the Confirm Reject Window to confirm that you wish to reject the ship to customer on the order; the system only displays the Confirm Order/Call Disposition Window if you reject the entire order.
NONE or blank	The system does not capture order/call disposition activity in the Order Disposition table. In addition, the system displays the Confirm Reject Window when you reject an order.

To view order/call disposition activity: You can review order/call disposition activity in the Order Disposition table.

The setting of the Capture Order/Call Disposition (K03) system control value controls when the system creates a record in this table.

**Note:**

You cannot view the information in the Order Disposition table from any Order Administration screen.

Order Disposition Table

Field	Description
Company	A code for the company where the order or call was placed. <i>Numeric, 3 positions.</i>
Order #	The order number associated with the order/call disposition. An order number displays when: • you reject an order in interactive order entry if the Capture Order/Call Disposition (K03) system control value is set to ORDER or ALL. The <i>Reject reason code</i> indicates why the order was rejected. • you accept an order in interactive order entry if the Capture Order/Call Disposition (K03) system control value is set to ALL. <i>Numeric, 8 positions.</i>
Order ship to #	The order ship to associated with the order/call disposition. An order ship to number displays when: • you reject an order in interactive order entry if the Capture Order/Call Disposition (K03) system control value is set to ORDER or ALL. The <i>Reject reason code</i> indicates why the order was rejected. • you accept an order in interactive order entry if the Capture Order/Call Disposition (K03) system control value is set to ALL.

**Note:**

If an order contains multiple ship to customers, the system creates one record in the [Order Disposition Table](#) for the order for the first ship to customer.

Numeric, 3 positions.

Field	Description
Universal call ID (UCID)	The UCID, or universal call identifier, associated with a call received into Order Administration from an external order call center. You can use this ID to track each individual call received from the order call center. This field remains blank if the order is not associated with a call received from an external order call center. If you end a call that does not result in placing an order, the order disposition record contains a UCID number without an order number or order ship to number. <i>Alphanumeric, 50 positions.</i>
Source code	A code for the source code associated with the order or call. <i>Alphanumeric, 9 positions.</i>
Reject reason code	A code for the order/call disposition reject reason code assigned to the order or call, indicating why the order was rejected or the call was ended before an order was placed. Reject reason codes are defined in and validated against the Reject Reason table; see Working with Order/Call Disposition Reject Reason Codes (WWRR). <i>Alphanumeric, 2 positions.</i>
Entered by user	The user ID associated with the order or call. For calls received from an external order call center, this is the user ID of the operator that took the call. <i>Alphanumeric, 10 positions.</i>
Create date	The date when the order or call was placed. <i>Numeric, 8 positions (in user date format).</i>
Create time	The time when the order or call was placed. <i>Numeric, 6 positions (HHMMSS format).</i>

Order Disposition Information Captured for a Terminated Call

The system captures the following information in the [Order Disposition Table](#) when you end a call received from an external order call center if the Capture Order/Call Disposition (K03) system control value is set to ALL and a *Universal call ID* is defined for the call in the Order Disposition table:

- company
- universal call ID
- source code
- reject reason code
- entered by user
- create date
- create time

Order Disposition Information Captured for an Approved Order

The system captures the following information in the [Order Disposition Table](#) when you accept an order in interactive Order Entry if the Capture Order/Call Disposition (K03) system control value is set to ALL:

- company

- order #
- order ship to #
- universal call ID (if the order is associated with a call from an external order call center; otherwise, this field remains blank)
- source code
- entered by user
- create date
- create time

Order Disposition Information Captured for a Rejected Order

The system captures the following information in the [Order Disposition Table](#) when you reject an order in interactive Order Entry if the Capture Order/Call Disposition (K03) system control value is set to ALL or ORDER:

- company
- order #
- order ship to #
- universal call ID (if the order is associated with a call from an external order call center; otherwise, this field remains blank)
- source code
- reject reason code
- entered by user
- create date
- create time

Entering Pre-Order Quotes

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

Why create quotes? You may wish to create quotes for high-priced items or items whose price is negotiable, such as furniture or recreational vehicles.

What's Required On a Quote?

To complete a quote you must define the customer requesting the quote, the merchandise included in the quote, and a delivery address for the merchandise.

Entering a quote is similar to entering a standard order:

- You enter and verify customer and quote information on the [Work with Order Screen](#).
- You add items to the quote on the Work with Order Lines screen. The system uses standard pricing logic to determine the price of each item on a quote and whether the quote is eligible for any discounts or promotions.

- You define a payment method for the quote on the [Enter Payment Method Screen](#). The *Pay method required* setting for the order type on the quote determines whether a payment method is required.
- When you accept the quote, you can select to email a Quote Confirmation and print a Quote form for the customer, listing the items on the quote and the estimated order totals.

In addition, you can receive quotes through the *Generic Order Interface (Order API)*; see *Creating a Quote through the Order API*.

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

How are Quotes Different from Orders?

Unlike standard orders:

- Because the system does not reserve items on quotes, adding an item to a quote does not guarantee that the item will be available when the customer is ready to order. When you convert a quote to an order, the system reserves inventory and displays the [Unavailable Quoted Order Lines Screen](#), listing the items on the quote that are not available because they are on backorder or are soldout.
- You can have only one ship to customer on a quote, and all of the items on a quote must ship to the same address.
- The price of each item on a quote is not guaranteed unless you enter a price override reason code in the [Price Override Reason for Quotes \(K75\)](#) system control value. The system assigns this price override reason code to each order line that does not already have a price override reason code defined when you accept the quote.
- The freight charges on a quote are not guaranteed unless you select the [Override Freight on Quote Conversion \(K76\)](#) system control value. The system applies the freight and additional freight charges on a quote as a freight override when you accept the quote.
- You cannot express bill any items on a quote.
- You cannot apply a pre-paid pay type to a quote.
- The system does not reduce inventory or update demand until you convert a quote to an order.
- The system does not perform any credit or fraud checking until you convert a quote to an order.

See [Quote Restrictions](#) for additional functionality that is not available on a pre-order quote.

In this topic:

- [Pre-Order Quote Setup](#)
- [Advancing to Quote Entry](#)
- [Types of Customers on a Quote](#)
- [Entering Header Information on a Quote](#)
- [Adding Items to a Quote](#)
- [Entering Customer Memberships in Quote Entry](#)
- [Soldout Processing on Quotes](#)
- [Adding a Payment Method to a Quote](#)
- [Completing a Quote](#)
- [Assigning an Expiration Date to a Quote](#)

- [Print/Email Quote Window](#)
- [Reviewing Quotes](#)
- [Quote Restrictions](#)
- [Quote Entry Updates](#)

For more information: See:

- [Creating a Quote through the Order API](#) for more information on creating a quote through the generic order interface.
For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).
- [Maintaining Quotes in Order Maintenance](#) for more information on the updates you can make to a quote before it is converted to an order.
- [Cancelling a Quote through Order Maintenance](#) for more information on how to cancel a quote.
- [Converting Quotes to Orders](#) for more information on the updates the system performs when you convert a quote to a standard order.

Pre-Order Quote Setup

Before you can enter a pre-order quote, you must complete the required setup.

- [Pre-Order Quote Order Type](#)
- [Quote Confirmation Email Template](#)
- [Price Override Reason for Quotes](#)
- [Cancel Reason for Quotes](#)
- [System Control Values](#)

Pre-Order Quote Order Type

Use the [Establishing Order Types \(WOTY\)](#) menu option to create an order type that represents pre-order quote orders. You can create one or more pre-order quote order types.

When you create a pre-order quote order type, you must indicate the following:

Field	Description
Quote	Indicates whether orders for this order type represent a pre-order quote and not a regular order. Valid values are: • Selected = Orders for this order type represent a pre-order quote. • Unselected = Orders for this order type represent a regular order. <i>Required for pre-order quote order types.</i>

Field	Description
Expiration days	Indicates the number of days a pre-order quote is valid before it expires. When you accept a pre-order quote in order entry, the system updates the <i>Cancel date</i> for the quote based on the quotes arrival date and the expiration days. The system removes the cancel date when you convert the quote to an order. Example: If the arrival date for a quote is 10/29/09 and the expiration days defined for the quote order type is 30, the system updates the <i>Cancel date</i> for the quote to 11/28/09.

 Note:

If you change the order type for a quote to another order type whose *Quote* field is selected, the system recalculates the cancel date for the quote, based on the number defined in the *Expiration days* field for the new order type. If an *Expiration days* has not been defined for the new order type, the system removes the cancellation date from the quote.

	<i>Numeric, 3 positions; optional.</i>
Pay method required	Indicates whether a pay method is required on a pre-order quote. Valid values are: • Selected = A pay method is required on a pre-order quote. You cannot add a pre-paid pay method to a quote. • Unselected = A pay method is not required on a pre-order quote. The system does not require a pay method until the quote is converted to an order.

 Note:

If you change the order type for a quote to another order type whose *Quote* field is selected, the system requires a pay method for the quote based on the setting of the *Pay method required* field for the new order type.

Optional.

Field	Description
Exclude S/O on order confirmation	Indicates if the system excludes soldout items on the quote confirmation email or the <i>Outbound Email XML Message (CWEmailOut)</i> and the Quote Form. For example, you may wish to exclude soldout items when generating quote confirmations and forms for quotes taken over the phone, but include soldout items when generating quote confirmations and forms for quotes you receive through the order API. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Selected = Exclude soldout items on the quote confirmation email or the <i>Outbound Email XML Message (CWEmailOut)</i> and the Quote form.

 Note:

If the soldout item is the only item on the quote and you exclude soldout items from printing, the system does not display the [Print/Email Quote Window](#) where you can select to generate a quote confirmation email or Quote form.

- Unselected = Include soldout items on the quote confirmation email or the *Outbound Email XML Message (CWEmailOut)* and the Quote form.

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

 Note:

- The system excludes soldout items from the quote confirmation email only if the program in the [Quote Confirmation Email Program \(K74\)](#) system control value is based on the QUOCONF base program.
- The system excludes soldout items from the Quote form only if the program in the [Quote Printing Program \(K73\)](#) system control value is based on the QUOTE or QUOTEG base program.

In addition:

Field	Description
Promotional pricing windows	If you select to display promotional pricing windows, the system will display promotional pricing windows when you enter a pre-order quote. See Upselling the Customer in Order Entry.

Field	Description
Soldout notifications	If this field is selected and the <i>Email notifications</i> field for the order type is also selected, the system generates a soldout notification for items on quotes that are soldout automatically by the Processing Auto Soldout Cancellations (MASO) menu option. The system does not generate a soldout notification for items that are soldout during quote entry or quote maintenance. See Soldout Processing on Quotes.
Immediate B/O notice	The system ignores this setting since backorder notices are not generated for pre-order quotes. The system generates a backorder notice when you convert a quote to a standard order. See Converting Quotes to Orders.
Email notification	If this field is selected and the <i>Soldout notifications</i> field for the order type is also selected, the system generates a soldout notification for items on quotes that are soldout automatically by the Processing Auto Soldout Cancellations (MASO) menu option. The system does not generate backorder notices or order confirmations for pre-order quotes. The system generates these email notifications when you convert a quote to a standard order. See Converting Quotes to Orders.
OnLine Authorization	The system performs online authorization for a pre-order quote based on this setting and if a credit card type payment method is added to the pre-order quote. See Performing Online Credit Card Authorizations.
Address standardization	The system performs address standardization for the customer address on the pre-order quote based on this setting. See Experian Data Quality (EDQ) Address Validate API.

 Note:

The Address standardization setting is only used for a quote order entered through the Order API. Type-ahead Address Lookup is used for a quote order entered using Modern View.

Quote Confirmation Email Template

Use the [Working with E-Mail Notification Templates \(WEMT\)](#) menu option to create an email template that the system uses when generating a Quote Confirmation email. You can override the standard email template text for the order type or entity; see [Email Setup within Order Administration](#) for more information.

Outbound email API: Order Administration generates a generic outbound XML message, rather than an actual email, for quote confirmations if the *XML only?* flag for the quote confirmation template is selected and the [Quote Confirmation Email Program \(K74\)](#) system control value is not blank. The *Outbound Email XML Message (CWEmailOut)* includes additional information that is not included in the standard email notice. You might choose to generate the XML message so that you can use this information to produce a reformatted HTML that includes additional information. See *Outbound Email API* for an overview and message details.

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

Determining when to email a quote confirmation: See [Quote Confirmation Emails](#) for a discussion on the criteria required to generate the Quote Confirmation email. See [Quote Confirmation Email Sample and Contents](#) for a sample email.

Price Override Reason for Quotes

Use the [Establishing Price Override Reason Codes \(WPOR\)](#) menu option to create a price override reason to apply to items that are added to a pre-order quote. Applying this price override reason code prevents the system from applying a new price to the item when you maintain the quote or convert the quote to a regular order.

Once you have created the price override reason code, enter the code in the Price Override Reason for Quotes (K75) system control value.

Cancel Reason for Quotes

Optionally, use the [Establishing Cancel Reason Codes \(WCNR\)](#) menu option to create a cancel reason to apply to quotes that you cancel in order maintenance. See [Cancelling a Quote through Order Maintenance](#).

System Control Values

System Control Value	Description
Quote Printing Program (K73)	Defines the name of the program that prints the Quote form. The standard graphical quote printing program is QUOTEG. The standard non-graphical quote printing program is QUOTE.
 Note: The Quote form is not currently implemented.	
Quote Confirmation Email Program (K74)	Defines the program to generate quote confirmations for pre-order quotes. The standard base program is QUOCONF, which generates a notification email in HTML format.
Price Override Reason for Quotes (K75)	Defines the price override reason code the system applies to each detail line on a pre-order quote when it is accepted so that the quoted price for each item is retained.
Override Freight on Quote Conversion (K76)	Defines whether the freight and additional freight charges on a pre-order quote are used as a freight override when the quote is converted to a regular order.

Advancing to Quote Entry

Use the Enter/Maintain Orders (OEOM) menu option to create and maintain a quote. The system uses the *Quote* field on the order type to identify the order as a standard order or a pre-order quote.

- If the *Quote* field for the order type is selected, the system identifies the order as a pre-order quote.
- If the *Quote* field for the order type is unselected, the system identifies the order as a standard order; see [Entering Orders](#).

Receiving a quote through the generic order interface: You can create a pre-order quote on the web storefront and send the quote information to Order Administration using the *Generic Order Interface (Order API)*. See *Creating a Quote through the Order API*.

Maintaining quotes: You can use the standard Order Inquiry/Maintenance (OIOM) menu option to maintain and inquire on a quote. See [Maintaining Quotes in Order Maintenance](#).

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

Types of Customers on a Quote

As in standard order entry, a quote can contain the following customers.

Customer	Description
Sold to customer	The person or business who requested the quote. If the sold to customer does not exist in Order Administration, the system creates the customer in the Work with Customers (WCST) menu option. See Selecting Customers in Order Entry .
Ship to customer	The address where the merchandise will be delivered when the quote is converted to an order. A quote can contain a sold to address and one ship to address. If you don't define a ship to address, the system delivers the merchandise to the address defined for the sold to customer. You can add the following types of ship to customers to a quote. One time shipping address: A one time shipping address is an address that is attached to the quote you are entering, but which is not saved as a permanent mailing address for the sold to customer. To add a one time address to a quote, select One Time Ship To on the Order Header screen. See Assigning an Order Shipping Address. Permanent shipping address: Permanent shipping addresses are address that are kept on file for the sold to customer. Examples of permanent ship to addresses would be the customer's work address and home address. The system adds a separate record to the Customer Ship To table for this shipping address under the customer number. You can define up to 999 permanent shipping addresses for one customer. To add an address book customer to a quote, select Address Book on the Order Header screen. See Using a Permanent Shipping Address in Order Entry. Recipient/Gift quote: A recipient/gift quote allows you to ship the merchandise to another address or customer. You can flag the quote as a gift by selecting the <i>Gift</i> field on the Work with Order screen. You can then select Sold To/Recip to enter the address where the gift will be shipped. See About Gift Orders.

 Note:

If you enter a gift quote, the system prints pricing information on the [Quote Form](#) and Quote Confirmation.

Excluded from quotes: You cannot add a recipient ship to customer to a quote. If you select Accept/Add Rcp to accept the quote and add a recipient customer to the quote, the system displays an error message: *Add recipient not allowed with Quote*.

Customer	Description
Bill to customer	The person that will be charged for the quote when it is converted to an order. Billing addresses are addresses where you send the invoice for an order. A sold to customer can have only one billing account; however, more than one customer can use the same billing account. See Assigning a Billing Address in Order Entry.

Address standardization: If you have enabled address standardization for the order type on the quote, the system uses the EDQ Address Validate API to standardize the address on the quote if the quote is coming in Order Administration via the Order API; see [Experian Data Quality \(EDQ\) Address Validate API](#) for an overview and the required setup.



Note:

Quote orders entered through Modern View Order Entry use type-ahead address lookup functionality and do not consider this field on the order type.

Entering Header Information on a Quote

Use the [Work with Order Screen](#) to enter or verify customer and header information, such as the source code and ship via on the quote.

Printing order header messages on the Quote form: You can flag an order header message to print on the [Quote Form](#) by selecting Quote in the *Print* field for the message on the [Work with Order Messages Screen](#). The first four order header messages whose *Print* flag is set to Quote print on the form.

Field descriptions and screen options: See [Work with Order Screen](#) for a complete description of the fields and options available on this screen.

The fields below describe information on the Work with Order screen that applies specifically to entering quotes in order entry.

Field	Description
Order #	The system uses the Order Header number assignment wheel to assign a unique number to the quote.
Recip Sts	The system assigns a Quote status to all new quotes. The quote retains this status until it is either canceled or converted to an order; see Cancelling a Quote through Order Maintenance and Converting Quotes to Orders .
Email	The system sends the Quote Confirmation email to this email address. If an email address is not defined on the quote, the system sends the Quote Confirmation email to the email address defined for the sold to customer on the quote. See Quote Confirmation Emails and Quote Confirmation Email Sample and Contents.
Via	Because the system does not reserve inventory until a quote is converted to an order, the system does not allow you to enter an express bill ship via on a quote (the <i>Billing</i> field for the ship via code is set to Express): Express bill not allowed with quote.

Field	Description
Salesrep	The system includes the salesman on the Quote Confirmation email and Quote Form. In addition, you can review the quotes associated with a salesman on the Salesman Demand Report. See Quote Confirmation Email Sample and Contents for a sample of the Quote Confirmation.
Type	The order type assigned to the quote. For quotes, the Quote field for the order type is selected, indicating orders for this order type are pre-order quotes. • If you change the order type to another type whose <i>Quote</i> field is selected, the system uses the new order type's Expiration days and Pay method required settings to determine the cancel date on the quote and whether a pay type is required for the quote. See Assigning an Expiration Date to a Quote and Adding a Payment Method to a Quote. • If you change the order type to a type whose <i>Quote</i> field is unselected during quote entry, the system performs standard order entry; see Entering Orders. • If you change the order type to a type whose <i>Quote</i> field is unselected during quote maintenance, the system converts the quote to an order; see Converting Quotes to Orders.  Note: During quote entry: • You cannot change from a non-quote order type to a quote order type if reserved order lines already exist: Quote type not allowed - reserved order lines exist. • If you change from a quote order type to a non-quote order type and order lines already exist, you will need to delete and reenter them in order to perform reservation.
Hold Reason	If you enter a hold reason code, the system does not update the status of the quote to Held; the status remains Quote. The hold reason code is informational-only. You can remove the quote from hold in order maintenance; see Maintaining Quotes in Order Maintenance. If you convert the quote to an order, the system retains the hold reason and updates the status of the order to Held; see Converting Quotes to Orders.
Order date	The date you entered the quote. Defaults to the current date, but you can override it.

Field	Description
Arrival date	Regardless of the arrival date, the system does not reserve inventory on quotes. The system reserves inventory when the quote is converted to an order; see Converting Quotes to Orders. Assigning an expiration date to a quote: If a number of days has been entered in the Expiration days field for the order type on the quote, the system assigns a cancel date to the quote and each line on the quote, indicating when the quote is no longer valid and should be cancelled. The system uses the following calculation to assign a cancel date to a quote: $\text{Quote arrival date} + \text{Order type Expiration dates} = \text{Quote expiration date}$ The system stores the quote expiration date in the <i>Cancel date</i> field in the Order Header table and Order Detail table.
Cancel date	If a number of days has been entered in the Expiration days field for the order type on the quote, the system assigns a cancel date to the quote and each line on the quote when you accept the quote. The cancel date indicates when the quote is no longer valid; see Assigning an Expiration Date to a Quote. The system uses the following calculation to assign a cancel date to a quote: $\text{Quote arrival date} + \text{Order type Expiration dates} = \text{Quote expiration date}$ If you manually enter a date in the <i>Cancel date</i> field on the Work with Order screen, the system overrides the date you entered with the calculated quote expiration date.

 **Note:**

The cancel date cannot be earlier than the arrival date: Cancel date cannot be earlier than arrival date.

Order Cancellation List

Once the cancel date has been reached the quote prints on the [Order Cancellation List](#). Customer Service uses this list to contact each customer to see if the deadline can be extended. If not, Customer Service must use Order Maintenance to cancel the quote. See [Cancelling a Quote through Order Maintenance](#).

Adding Items to a Quote

Use the Work with Order Lines screen to add items to a quote.

Inventory reservation: The system does not reserve inventory for order lines on a quote. The system performs inventory reservation when the quote is converted to an order. See [Converting Quotes to Orders](#).

Messages and windows during quote entry: The system displays messages and windows related to items added to a quote as in standard order entry; see [Miscellaneous Messages and Windows at Item Entry](#).

Discounts and promotions: The system applies discounts and promotions to a quote as in standard order entry; see [Order Repricing, Premiums, Discounts, and Promotions](#).

Retaining the quoted price: When you accept a quote, the system assigns the price override reason code defined in the Price Override Reason for Quotes (K75) system control value to each detail line so that the price of each item is retained.

- You can select Reprice during quote entry and maintenance to reprice the quote and apply any qualifying discounts, premiums, and promotions to the quote; however, the system does not reprice any lines that contain a price override reason code. If you wish to reprice these lines, you must remove the price override reason code from the line.
- If a detail line already contains a price override reason code (for example, you manually entered a price override reason code), the system will not reprice the line and will not assign the price override reason code defined in the *Price Override Reason for Quotes* (K75) system control value to the line.
- If a price override reason code is not defined in the Price Override Reason for Quotes (K75) system control value, you can reprice the lines on a quote during quote maintenance and when you convert the quote to an order, using regular pricing logic.

Field descriptions: See [Work with Order Lines Screen \(Adding Items to the Order\)](#) for a complete description of the fields and options available on this screen.

The fields below describe information on the Work with Order Lines screen that applies specifically to entering Quotes in order entry.

Field	Description
Item	You can add different types of items to a quote as in standard order entry; see Adding Different Types of Items to the Order . Membership items: See Entering Customer Memberships in Quote Entry .
Qty	You cannot enter an item for a negative quantity on a quote: Negative quantity not allowed on quote.
Price	As in standard order entry, the system calculates the price of an item by taking into account any price breaks and source or order discounts, and uses the pricing routine (pricing hierarchy) in the Pricing Values (B31) system control value to determine the price of the item on the order line.

Field	Description
Ovr Price override reason code	The price override reason code assigned to the order line. If you have the authority, you can override the price of an item and specify a price override reason code. When you accept a quote, the system assigns the price override reason code defined in the Price Override Reason for Quotes (K75) system control value to each detail line so that the quoted price for each item is retained. - You can select Reprice during quote entry and maintenance to reprice the quote and apply any qualifying discounts, premiums, and promotions to the quote; however, the system does not reprice any lines that contain a price override reason code. If you wish to reprice these lines, you must remove the price override reason code from the line. - If a detail line already contains a price override reason code (for example, you manually entered a price override reason code), the system will not reprice the line and will not assign the price override reason code defined in the Price Override Reason for Quotes (K75) system control value to the line. - If a price override reason code is not defined in the Price Override Reason for Quotes (K75) system control value, you can reprice the lines on a quote during quote maintenance and when you convert the quote to an order, using regular pricing logic.
Rsv Quantity reserved	The system does not reserve inventory for order lines on a quote. The system performs inventory reservation when the quote is converted to an order. See Converting Quotes to Orders.
Avl Quantity available	The quantity of the item that is available to sell across all shippable warehouses. This is the quantity of the item available in the system that is not set aside for orders or backorders. When you add an item to a quote, the system does not reduce the quantity available and does not update the quantity open by the quantity ordered on a quote. You can use the quantity available for the item to inform the customer of low stock situations and whether the item is on backorder or soldout. Example: You add item ABC to a quote. The available quantity for item ABC is 20. You add item ABC to another quote. Since this item has not been added to a regular order since the first quote was created, the available quantity for item ABC is still 20. The system does not decrease the available quantity for an item when it is added to a quote.
Sts Status	The current status of the detail line. The status field is blank (Open) or is set to S (soldout) during quote entry. Soldout status: See Soldout Processing on Quotes.

 Note:

The system does not generate a backorder notification for a pre-order quote. The system generates a backorder notification when the pre-order quote is converted to a regular order and it is accepted.

Field	Description
Exp	This field does not display for items on a quote.
Expected receipt date	In order to review availability, select Availability for an item to advance to the Item Availability screen. When you convert a quote to an order, the system displays the Unavailable Quoted Order Lines Screen , listing the items on the converted quote that are on backorder or soldout.

Entering Customer Memberships in Quote Entry

You can create a standard customer membership in quote entry. The system performs the same updates as it would when you create a customer membership in regular order entry; however, the system creates the customer membership in an inactive status. The customer membership will remain inactive until you convert the quote to an order.

If you enter a membership item on a quote:

- You advance to the [Enter Membership ID Window \(Selecting a Membership Program\)](#) as in standard order entry where you can select the membership to add to the quote.
- The system does not require a pay type and does not display the [Order Total Window \(Reviewing the First Order Total\)](#) until you convert the quote to an order.
- If you delete the membership item from the quote in quote entry, the system will not create the customer membership. If you delete the membership item from the quote in quote maintenance, the system will also delete the customer membership.
- If you accept the quote, you can review the customer membership in the [Working with Customer Memberships \(WWCM\)](#) menu option. The status of the customer membership is inactive. Because the membership status is inactive the system will not generate a membership order until you convert the quote to an order; see [Converting Quotes to Orders](#).
- If you cancel the quote, the system will also cancel the customer membership.
- Once you convert the quote to an order, the system updates the status of the customer membership to active and generates membership orders for the customer based on the customer membership's next release date.

For more information: See [Entering Customer Memberships in Order Entry](#) for more information on membership processing in order entry.

Soldout Processing on Quotes

If an item on a quote contains a soldout code, the system sells out the item on the quote using existing soldout processing.

Exclude soldouts on Quote Confirmation and Form? The *Exclude S/O on order confirmation* field for the order type on the quote indicates if the system excludes soldout items on the quote confirmation email or the *Outbound Email XML Message (CWEmailOut)* and the [Quote Form](#).

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

- If this field is selected, the system excludes soldout items on the quote confirmation email or the *Outbound Email XML Message (CWEmailOut)* and the Quote form. For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

 Note:

If the soldout item is the only item on the quote and you exclude soldout items from printing, the system does not display the [Print/Email Quote Window](#) where you can select to generate a quote confirmation email or Quote form.

- If this field is unselected, the system includes soldout items on the quote confirmation email or the *Outbound Email XML Message (CWEmailOut)* and the Quote form.

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

Automatic soldout processing: If you use [Processing Auto Soldout Cancellations \(MASO\)](#) to automatically cancel soldout items, the system includes soldout items on quotes. When you run process auto soldout cancellations, the system automatically cancels soldout items that were added to a quote before the item sold out. In addition, if the *Soldout notifications* field for the order type on the quote is selected, the system generates a soldout notification for the soldout items in order to notify the customer and prevent confusion when the quote is converted to an order. See [Generating Soldout Notifications \(MSON\)](#).

Evaluating soldout items during quote conversion: When you convert the quote to an order, the item remains soldout and displays on the [Unavailable Quoted Order Lines Screen](#); the system does not reevaluate soldout order lines based on current inventory status. In order to reevaluate soldout order lines during quote conversion, you will need to delete the existing soldout order line and add a new order line to the order for the item that is soldout.

Adding a Payment Method to a Quote

Use the [Enter Payment Method Screen](#) to add a pay type to the quote. In addition, you can use the [Work with Order/Recap Screen](#) to add a pay type to the quote.

Payment method required? The [Pay method required](#) field for the order type on the quote defines whether a pay type is required on a quote.

- If the *Pay method required* field is selected, the system requires you to enter a pay type on a quote before the quote can be accepted.
- If the *Pay method required* field is unselected, the system does not require a pay type on a quote. A pay type is not required until the quote is converted to an order.

The system performs the same pay type validation as in standard order entry; see [Pay Type Editing](#).

Cash/check pay type: You cannot enter a cash/check pay type on a quote. You can add a cash/check pay type when the quote is converted to a regular order.

Default pay type pop-up windows: The system displays a default pay type window when you select Accept Order at the [Work with Order Lines Screen \(Adding Items to the Order\)](#) if you defined a default payment method on the [Default Values for Orders screen](#). However, if you defined a default cash/check pay type, the system will not display the [Enter Cash Control For Window \(Cash/Check Payment Type\)](#) since you cannot enter a cash/check pay type on a quote. See [Default Paytype Pop-up Windows](#).

Online authorization: If you add a credit card pay type to a quote and the order type on the quote allows online authorization, the system performs online authorization when you accept the quote. See [Performing Online Credit Card Authorizations](#).

Assigning a payment plan to a quote: You can assign a payment plan to a quote. When you convert the quote to an order, the system updates the deferred bill date or installment bill dates.

Deferred payment plan example: On 11/10/09, you enter a quote and apply a deferred payment plan to the credit card pay type on the quote. When you accept the quote, the system assigns a deferred bill date of 12/20/09 to the quote (based on a 30 day deferral). On 11/12/09, you convert the quote to an order. When you accept the converted order, the system updates the deferred bill date to 12/22/09.

Installment payment plan example: On 11/10/09, you enter a quote and apply an installment payment plan to the credit card pay type on the quote. When you accept the quote, the system assigns the following installment bill dates to the quote: 11/10/09 and 12/10/09. On 11/12/09, you convert the quote to an order. When you accept the converted order, the system updates the installment bill dates to 11/12/09 and 12/12/09.

See [Assigning a Payment Plan to the Order](#) for more information.

Completing a Quote

When you finish entering the quote, you can either:

- Accept the quote.
- Reject the quote.

Rejecting a Quote

When you select Reject Order, the system looks at the setting of the [Capture Order/Call Disposition \(K03\)](#) system control value to determine how to proceed.

- If this system control value is set to ORDER or ALL, the system advances you to the [Confirm Order/Call Disposition Window](#) where you must enter a reject reason code explaining why you are rejecting the quote. In addition, the system creates a record in the [Order Disposition Table](#) so that you can track order/call disposition activity; see [Tracking Order/Call Disposition Activity](#).
- If this system control value is set to NONE or blank, the system advances you to the [Confirm Reject Window](#) where you must select OK in order to proceed with the quote rejection.

Accepting a Quote

When you select Accept Order:

1. The system verifies the accuracy of all quote information and, if the *Pay method required* field for the order type is selected, ensures that you have defined some method of payment.
2. The system adds the new quote immediately to the Order tables; it becomes available for Order Maintenance and standard or streamlined Order Inquiry.
3. The system selects the *Quote Origin* field on the [Work with Order Ship to Properties Screen](#) to indicate the order originated as a pre-order quote. The system retains this setting when you convert the quote to an order.
4. If the [Override Freight on Quote Conversion \(K76\)](#) system control value is selected, the system applies the freight and additional freight charges on the quote as a freight override. You can review the freight and additional freight charges on the quote in the *Freight override* field on the [Work with Order Ship to Properties Screen](#).
5. The system assigns the price override reason code defined in the Price Override Reason for Quotes (K75) system control value to each detail line that does not already have a price override reason defined.
6. The system assigns an expiration date to the quote and each item on the quote if a number of days has been entered in the Expiration days field for the order type on the quote; see [Assigning an Expiration Date to a Quote](#).

7. The system sends the credit card payment method on the quote to the authorization service if you are set up to perform online credit card authorizations; see [Performing Online Credit Card Authorizations](#).
8. A scrolling message similar to the following displays at the bottom of the screen:
Finalizing order, Finalizing order.
9. The system advances you to the [Print/Email Quote Window](#), where you can select to print the [Quote Form](#) or generate the Quote Confirmation email.
10. Several updates occur; see [Quote Entry Updates](#).

Assigning an Expiration Date to a Quote

The Expiration days field for the order type on the quote indicates the number of days a pre-order quote is valid before it expires.

When you accept a pre-order quote in order entry or maintenance, the system updates the *Cancel date* for the quote based on the quotes arrival date and the expiration days. The system removes the cancel date when you convert the quote to an order.

The system uses the following calculation to assign a cancel date to a quote:

Quote arrival date + Order type Expiration days = Quote expiration date

The system stores the quote expiration date in the *Cancel date* field in the Order Header table and Order Detail table.

Example: If the arrival date for a quote is 10/29/09 and the expiration days defined for the quote order type is 30, the system updates the *Cancel date* for the quote to 11/28/09.

If you change the order type on a quote: If you change the order type on a quote to another order type whose *Quote* field is selected, the system recalculates the cancel date for the quote, based on the number defined in the *Expiration days* field for the new order type. If an *Expiration days* has not been defined for the new order type, the system removes the cancellation date from the quote.

Manually entering a cancel date: If you manually enter a date in the *Cancel date* field on the Work with Order screen or Work with Order Line screen, the system uses this date instead of the calculated quote expiration date.

Adding an item in order maintenance: If you add an item in order maintenance, the system assigns the cancel date defined on the order header to the new order line.



Note:

If you change the Expiration days field for the order type, the system applies the new expiration days to new quotes entered and does not update the expiration date for existing quotes.

Expired quotes: Once the cancel date has been reached, the quote prints on the [Order Cancellation List](#). Customer Service uses this list to contact each customer to see if the deadline can be extended. If not, Customer Service must use Order Maintenance to cancel the quote. See [Cancelling a Quote through Order Maintenance](#).

Print/Email Quote Window

Use this window to print the Quote form or generate the Quote Confirmation email.

If you maintain a quote: If you maintain a quote after printing the Quote form or generating the Quote Confirmation email, and the estimated order totals for the quote change as a result of your changes, you should resend the Quote form or Quote Confirmation to the customer so that the customer has the most recent estimated totals for the quote.

Order history: When you generate the Quote Confirmation email, the system creates an order history message, indicating the email was sent; for example: 10/28/09 LETTER Quote Conf to kbrown@example.co

How to display this screen:

- Select Accept to perform the final accept for a pre-order quote during order entry or maintenance, or
- Select the Print/Email Quotes option on the [Display More Options Screen](#).

Note:

This window does not open if:

- The Quote Printing Program (K73) and Quote Confirmation Email Program (K74) system control values do not contain a value, or
- All of the items on the quote are soldout and the *Exclude S/O on order confirmation* field for the order type on the quote is selected.

Field	Description
Print Quote	Indicates whether you wish to print the Quote form for the pre-order quote.

Note:

The system prints the Quote form based on the quote totals at the time you select to print the Quote form.

- Selected = Print the Quote form.
- Unselected = Do not print the Quote form.

This field displays only if the Quote Printing Program (K73) system control value contains a value.

See [Quote Form](#) for a sample of the form and a description of the contents on the quote form.

Field	Description
Email Quote	Indicates whether you wish to generate the Quote Confirmation email for the pre-order quote.

 **Note:**

The system generates the Quote Confirmation based on the quote totals at the time you select to email the Quote Confirmation.

- Selected = Generate the Quote Confirmation email. See Quote Confirmation Emails and Quote Confirmation Email Sample and Contents.
- Unselected = Do not generate the Quote Confirmation email. Order Administration generates a generic outbound XML message, rather than an actual email, for quote confirmations if the *XML only?* flag for the quote confirmation template is selected. The *Outbound Email XML Message (CWEmailOut)* includes additional information that is not included in the standard email notice. See *Outbound Email API* for an overview and message details.

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

This field displays only if an email address is defined for the order or sold to customer and the Quote Confirmation Email Program (K74) system control value contains a value.

Screen Option	Procedure
Print the Quote form and generate the Quote Confirmation email, based on the fields selected	Select OK. The system prints the Quote form and generates the Quote Confirmation email based on the fields you selected. See Quote Form for a sample Quote form and see Quote Confirmation Email Sample and Contents for a sample Quote Confirmation. The system returns you to the Select Customer Sold To screen or Customer Selection screen where you can enter another quote or standard order.

Reviewing Quotes

Similar to standard orders, you can review quotes in standard or streamlined Order Inquiry; see [Order Inquiry](#). In addition, quotes are included in the following reports and activities.

Reviewing open orders by item: Items on quotes are included in the [Displaying Open Orders by Item \(DOOI\)](#) menu option.

Customer history API: You can use the *Generic Customer History API* to review a customer's quote and order history, or detailed information about a single quote or order.

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

Pending order summary: You can review the summary information for quotes in the [Reviewing Pending Orders \(DOSS\)](#) menu option.

Salesman reports: Quotes are included on the [Salesman Demand Report](#), which lists merchandise, tax, and freight totals for orders and quotes by salesman number. Q displays in the *Order Status* field for orders flagged as quotes. The *Quantity Returned*, *Quantity Reserved*, and *Quantity Shipped* totals are always 0 for quotes.

Quote Restrictions

The following functionality is not available on a pre-order quote.

Option	Restriction
Multiple Ship To Customers	The system does not allow you to have multiple ship to customers on a quote; see Types of Customers on a Quote .
Order Confirmations	The system does not generate an order confirmation for a quote until it is converted to an order and the order is accepted.
Backorder Notifications	The system does not generate a backorder notification for a quote until it is converted to an order and the order is accepted.
Item Substitution	Item substitution processing does not include quotes. See Processing Item Substitutions (PSUB) .
Drop Ship Processing	The Selecting Vendors for Drop Ship Processing (MDSP) menu option does not include drop ship items that are on quotes until the quote is converted to an order and the order is accepted. In addition, drop ship items on quotes are not included on the Display Unprocessed Drop Ship Items Screen.
Inventory Reservation	Because the system does not reserve inventory for items on the quote, the following processes do not include quotes. • Reset SKU Open Order Quantity (MRSO) • Reset Backorder Quantity (MRBO) • Evaluate Backorder Reasons without Backorder Warehouse periodic function • Reserve Backorders periodic function • Working with Interactive Reservation (MIRV) • Evaluate Future Orders periodic function • Generate Order Orchestration Requests periodic function
Order Orchestration and Merchandise Locator	You cannot use Order Orchestration to send backordered lines on a quote to the Order Broker module in Order Orchestration for fulfillment. Also, you cannot use the merchandise locator integration to request current availability information about an item/SKU in retail stores within a geographic search area or in external warehouses. However, once the quote is converted to an order, the system will automatically send eligible backordered lines to the Order Broker module in Order Orchestration for fulfillment. Also, the merchandise locator option is available for eligible items on the order. See Order Orchestration Integration and Merchandise Locator API .
Credit checking	The system does not perform credit checking on a quote until it is converted to an order and the order is accepted.
Background Async Processing	Because the system does not perform background async processing on quotes, the following processes do not include quotes. • Resetting the Order Billing History Table (ROBH) • The system does not update the Customer Sold To \$ On Order. Because of this, the Resetting Customer Sold To Amount On Order (RONO) process does not include quotes. • The Display Reason/Offer Screen (Cancel Reason History) does not include canceled quotes.

Option	Restriction
Backorder Reports	The system does not include quotes that contain an item on backorder on the following backorder reports: • Backorder Report by Item • Backorder Report by Item with SKU Details • Backorder Report by Warehouse • Backorder Report by Warehouse with SKU Details • Backorder Report by Vendor • Backorder Report by Vendor with SKU Details • Backorder Report by Vendor w/PO • Backorder Report by Vendor/SKU/PO • Backorder Report by Descending Dollars by Entity/Warehouse • Backorder Report by Descending Dollars by Division/Warehouse • Backorder Report by Descending Dollars by Offer/Warehouse • Backorder Report by Descending Dollars by Warehouse
Order Reports	Because a quote may never be converted to an order, does not represent a true order, and is not included in demand, the system does not include quotes on the following reports: • Order Shipment Analysis Report • Product Performance Report (Ordered Totals) • Product Performance Report (Shipped Totals) • Campaign Performance Report (PCPR) • Order Reconciliation Report • Reviewing Operations Control Summary (FLSH) • Held Order by Reason Code Report • See Held Order Summary in Modern View online help.
Order Purge	Purging Orders (MPOR) does not include open quotes. Eligible cancelled quotes are included in the purge.
Workflow Activity	Quotes do not trigger any workflow activity.
Fraud Checking	The system does not check records in the Working with Miscellaneous Frauds (WMFF) or Working with Customer Fraud Tables (WCFD) until you convert a quote to an order; see Converting Quotes to Orders .

Quote Entry Updates

Purpose: The system performs updates to a number of tables to reflect the addition of a new quote to the system. The updates occur:

- Immediately (interactively), as you enter a quote; see [Immediate Quote Updates](#)
- When you select Accept Order; see [Quote Updates at Accept](#)
- The system does not perform any updates during background processing (Order Async) until the quote is converted to an order; see [Quote Conversion Updates During Background Processing](#).

Immediate Quote Updates

The system updates the following tables as you enter a new quote.

- Customer Sold To

 Note:

The system does not update the customer's mail type to Buyer when you accept a quote. In addition, the system does not update the customer sold to's item history or order history until you convert a quote to an order; see [Converting Quotes to Orders](#).

- Customer Sold To Extended Address
- Customer Sold To Phone #
- Customer Bill To

 Note:

The system does not update the customer bill to's *On order* dollars until you convert a quote to an order; see [Converting Quotes to Orders](#).

- Customer Bill To Extended Address
- Customer Bill To Phone #
- Customer Ship To

 Note:

The system does not update the customer ship to's item history or order history until you convert a quote to an order; see [Converting Quotes to Orders](#).

- Customer Ship To Extended
- Customer Ship To Phone #
- Customer Action Notes
- Order Additional Charges
- Order Coupon Discount
- Order Detail
- Order Detail Coupon
- Order Free Gift
- Order Header
- Order Information
- Order Line Message
- Order Message
- Order Payment Method
- Order Ship To
- Order Ship To Address
- Order Special Format
- Order Special Handling

See [Quote Conversion Updates During Background Processing](#) for more information on the tables the system updates when you convert a quote to an order.

Quote Updates at Accept

The system performs these table updates when you select Accept Order to accept a quote.

Process	Table	Field
Reprice order if the Price method field for the Source Code is set to D (Regular Item Pricing + Repricing)	Order Detail	Order detail price
Evaluate free gift eligibility, based on the source code or offer; create order detail records for free gift, if applicable	Order Detail	All fields
Calculate the \$ Discount, based on Source or Offer; add a record to the Order Additional Charges table	Order Additional Charges	All fields
Capture order disposition activity if the Capture Order/Call Disposition (K03) system control value is set to ALL; see Tracking Order/Call Disposition Activity	Order Disposition	Company Order # Order ship to # Universal call ID (if the order is associated with a call from an external order call center) source code entered by user create date create time
Approved online credit card authorization: Create an online authorization record, authorization history record, and void authorization record if you performed online credit card authorization for a credit card payment method on the order	Online Authorization Authorization History Void Authorization	Online Authorization: company order # seq # auth amount vendor response 1 (auth response) vendor response 2 (card security response) auth # auth date status: *UPDT trans seq # card number terminal # AVS result Card security value ASV auth service Authorization History: All fields except Amount Deposited Void Authorization: All fields

Process	Table	Field
Declined online credit card authorization: Create an online authorization record and authorization history record if you performed online credit card authorization for a credit card payment method on the order	Online Authorization Authorization History	Online Authorization: company order # seq # auth amount vendor response status: *SENT trans seq # card number terminal # ASV auth service Authorization History: All fields except Amount Deposited, Auth Date, and Auth #
Undefined online credit card authorization response: Create an online authorization record and authorization history record if you performed online credit card authorization for a credit card payment method on the order	Online Authorization Authorization History	Online Authorization: company order # seq # auth amount vendor response auth # auth date status: *UPDT trans seq # card number terminal # ASV auth service Authorization History: All fields except Amount Deposited
Online credit card authorization communication failure: Create an online authorization record and authorization history record if you performed online credit card authorization for a credit card payment method on the order	Online Authorization Authorization History	Online Authorization: company order # seq # auth amount auth # auth date status: *UPDT trans seq # card number terminal # ASV auth service Authorization History: All fields except Amount Deposited, Auth Date, Auth #, and Vendor Response

Customer Engagement Gift Registry and Customer Wish List Integration

Purpose: The Oracle Retail Customer Engagement Gift Registry and Wish List integration allows you to review a customer's gift registry or wish list across multiple channels, such as retail, call center, and e-commerce, using the Registries window in Modern View and Contact Center Order Entry. When you use these options, the system retrieves the sold to customer's registry or wish list information from Customer Engagement to display in Modern View.

How to create or update a registry for a customer: You need to use Customer Engagement to create or update a gift registry or wish list.

In this topic:

- [Customer Engagement Registry Setup](#)
 - [Setup in Order Administration for Customer Engagement Gift Registry and Wish List](#)
 - * [System Control Values for Customer Engagement Gift Registry or Wish List](#)
 - * [Web Service Authentication for Customer Engagement](#)
 - * [Customer Engagement Property Settings for Customer Engagement Registry](#)
 - * [Order Administration Company > Customer Engagement Organization](#)
 - [Setup in Customer Engagement for Item Registry and Wish List](#)
- [Reviewing a Customer's Gift Registry or Wish List in Order Administration Modern View and Creating a Registry Order](#)
- [Reviewing and Updating a Customer's Gift Registry or Wish List in Customer Engagement](#)
- [Customer Engagement Registry Service API v3.1](#)

For more information: See:

- [Customer Engagement Customer Integration](#) for more information on interactively communicating with Customer Engagement to keep customer information in Order Administration in sync with Customer Engagement when Customer Engagement is the system of record for customer information.
- [Customer Engagement Batch Customer and Sales Integration](#) for more information on sending merchandise hierarchy, item, customer, sales and return information from Order Administration to Customer Engagement using a batch process. This section also includes [Customer Engagement Integration Setup \(Sales and Customer\)](#).
- [Customer Engagement Loyalty Integration in the Imports/Exports Guide](#) for more information on using Customer Engagement's loyalty program.
- [Customer Engagement Purchase History Integration](#) for more information on reviewing a customer's purchase history from Customer Engagement.
- The Customer Engagement Implementation Guide (Installer Version) for more information on the procedures and instructions required to install and configure the Customer Engagement application and database.
- The Customer Engagement Implementation Guide for more information on configuration settings for Customer Engagement.
- The Customer Engagement Batch Processing and Web Services Guide for more information on the Customer Engagement API interface.

- The Customer Engagement Database Dictionary for more information on the tables in the Customer Engagement database.
- The Customer Engagement User Guide for more information on using the Customer Engagement application.

Customer Engagement Registry Integration Setup

Before you can review a customer's gift registry or wish list from Customer Engagement in Order Administration Modern View, or create a registry order in Modern View, you must complete the required setup.

Required versions:

- Order Management System version 21.2 or higher, or Order Administration.
- Customer Engagement version 16.0 or higher.

In addition, retrieving a customer's gift registry or wish list from Customer Engagement uses version 3.1 of the Customer Engagement Registry Service API.

Setup is required in both Order Administration and Customer Engagement.

For more information: See:

- [Customer Engagement Batch Customer and Sales Integration](#) for more information on the setup required to use the [Customer Engagement Sales Feed](#) and [Customer Engagement Customer Integration](#).
- [Customer Engagement Loyalty Integration](#) for more information on the setup required to use the Customer Engagement loyalty program.
- [Customer Engagement Purchase History Integration](#) for more information on the setup required to retrieve a customer's purchase history from Customer Engagement.

Setup in Order Administration for Customer Engagement Customer Gift Registry and Wish List

- [System Control Values for Customer Engagement Gift Registry or Wish List](#)
- [Web Service Authentication for Customer Engagement](#)
- [Customer Engagement Property Settings for Customer Engagement Registry](#)

System Control Values for Customer Engagement Gift Registry or Wish List

System Control Value	Description
ORCE Customer Integration (L37)	Enter INTERACT to send information on new and updated customers to Customer Engagement interactively. Required to use the gift registry and wish list integration. See Customer Engagement Customer Integration for more information.

System Control Value	Description
ORCE Integration Item ID (L38)	Defines how Order Administration identifies items/SKUs returned from Customer Engagement in the registry API. ITEM = Order Administration uses the <i>Item code</i> and <i>SKU code</i>. XREF = Order Administration uses the <i>Retail reference number</i>. The system uses the item ID to determine the item and SKU. The ORCE Integration Item ID (L38) system control value controls whether to identify the item by item and SKU or by a cross reference. See that system control value for more information. If the item and SKU is not found in Order Administration, description displayed in Modern View is <i>Store only item</i>. In this case, you cannot add the item to an order. Note: Order Administration also uses the setting of this system control value when sending requests to Customer Engagement in order to update the items on the customer's gift registry or wish list.
Use ORCE Registries (M26)	Select this system control value to use the Customer Engagement Registry integration.
Default Location for ORCE Integration (K69)	This system control value must specify a valid location in Customer Engagement to support creating registry orders in Modern View.

Web Service Authentication for Customer Engagement

Use the *ORCE Registry* entry in [Working with Web Service Authentication \(WWSA\)](#) to specify a valid client ID and client secret for authentication.



Note:

OAuth is required.

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

Customer Engagement Property Settings for Customer Engagement Registry

[Working with Customer Properties \(PROP\)](#) contains settings required for integration with Customer Engagement required for the item registry and wish list integration.

Setting	Description	Setting
ORCE_CUSTOMER_SERVICE_PREFIX	The system uses this property to build the URL for communication with Customer Engagement.	https://server:8447/ where: server = the name of your Customer Engagement server 8447 = the port to use on the Customer Engagement server

Setting	Description	Setting
ORCE_CUSTOME R_SERVICE_SUF FIX	The system uses this property, along with the <code>ORCE_CUSTOMER_SERVICE_PREFIX</code> and the value in the ORCE Organization Descriptor (L50) , to build the URL for communication with Customer Engagement using the Customer Services API.	/OrceWebServices/v2_3/ CustomerServicesApiService? wsdl where 2_3 is the version of the Customer Services API
ORCE_REGISTR Y_SERVICE_SUF FIX	The system uses this property, along with the <code>ORCE_CUSTOMER_SERVICE_PREFIX</code> and the value in the ORCE Organization Descriptor (L50) to build the URL for communication with Customer Engagement using the Customer Engagement Registry Service API.	/v3_1/RegistryServices? wsdl where 3.1 is the version of the Registry Service API.
ORCE_SECURIT Y_USER_ID	The Customer Engagement user ID with Security Group permission included in the Customer Engagement API messages.	Must be a valid user ID in Customer Engagement that has Security Group permission

Setup in Customer Engagement for Item Registry and Wish List

Order Administration Company > Customer Engagement Organization

An organization in Customer Engagement corresponds to a company in Order Administration. You associate a Customer Engagement organization with an Order Administration company through the [ORCE Organization Descriptor \(L50\)](#) system control value.

In Customer Engagement, define the *Organization Descriptor* for the organization that integrates with Order Administration, and that matches the ORCE Organization Descriptor (L50) system control value setting.

Selecting items for the registry in Customer Engagement:

- If there is not a record of the item in Order Administration, the item cannot be added to an order. In this case, the item description displayed is Store only item.
- Restricted items on a registry cannot be added to an order.
- Variable set items on a registry cannot be added to an order for the registry.
- If an item on the registry is assigned the status defined in the [Item Status for Suppressing Item During Item Selection \(L21\)](#) system control value, the item is not displayed in Contact Center Order Entry during registry order creation.

See the Customer Engagement **Implementation Guide** for more information on how to define configuration settings for Customer Engagement.

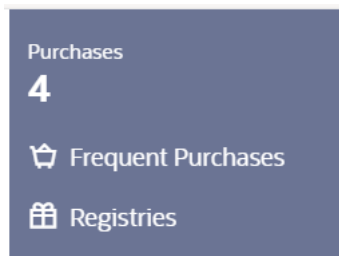
 Note:

Whenever you make changes to an organization's configuration settings, you must stop Customer Engagement, deploy the configuration settings to Customer Engagement, and restart Customer Engagement. See:

- **Shut Down Services** in the **Add New Organization** section of the Customer Engagement Implementation Guide (Installer Version) for more information on how to stop Customer Engagement.
- The Customer Engagement Configuration Guide for more information on deploying configuration settings Customer Engagement.
- **Restart Services** in the **Add New Organization** section of the Customer Engagement Implementation Guide (Installer Version) for more information on how to restart Customer Engagement.

Reviewing a Customer's Gift Registry or Wish List in Order Administration Modern View, and Creating a Registry Order

When customer integration with Customer Engagement is enabled, including gift registry and wish list integration, the Registries link is available in the Purchases tile at top of the Customer Order List page in Modern View.



The option is available regardless of whether the Orders, Items, Purchase History, or Loyalty tab is selected, and regardless of whether the customer currently has any existing registries.

When you select the Registries link, the Registries panel opens to the right. If the customer has more than one existing registry, the panel displays the list of registries, and you can select a registry to review. If the customer has a single registry, the panel displays the details of the registry, including the items on the registry. Any items that do not exist in Order Administration have a description of Store only item.

The Create Registry Order link is available when the Registries panel is displaying a registry, enabling you to use Contact Center Order Entry to enter an order for one or more of the items in the registry for the customer assigned to the registry in Customer Engagement. If the customer has any registries, the option to create a registry order is displayed within Contact Center Order Entry for a regular (non-registry) order.

When would you create a registry order? You might create a registry order if:

- A customer wants to purchase items on their own wish list. For example, a customer might create a wish list for items needed for the first semester at college.
- A customer wants to purchase items remaining on a registry after the event occurs. For example, after a baby shower, the customer might want to purchase any remaining items that were not given as gifts at the shower.

The options and information in Contact Center Order Entry differ somewhat from those available when you are entering a regular order. For example:

- The Add items to order step displays only the registry items when you have selected entry of a registry order.
- While the page displays registry items, the Quantity Desired and Quantity Purchased are displayed for these items.

When you are entering a registry order, you do have the option to search for all items. You can add non-registry items to a registry order, and vice versa. If the customer has more than one existing registry, you can add items from different registries to the order. The details of the currently selected registry are displayed at the top of the page.

When you submit the order, the *Quantity Purchased* is updated for each registry item on the order. Also, an Order Transaction History record indicates that an item was purchased for a registry, for example: Line 2 purchased from Sample Registry.

See *Order Entry* in the Modern View online help for more information.

Reviewing and Updating a Customer's Gift Registry or Wish List in Customer Engagement

You can view and update a customer's wish list on the **View Registry** screen for a customer, available from the Customer Dashboard in Customer Engagement Modern View. See **Registries** in the Customer Engagement **JET UI User Guide** for screen details.

Customer Engagement Registry Service API v3.1

The Customer Engagement Registry Service API v3.1 is used to communicate with Customer Engagement to retrieve and update a customer's gift registry or wish list.

Order Administration calls the Customer Engagement Registry Services API version 3.1 to generate the following messages:

URL: The system uses the [ORCE_CUSTOMER_SERVICE_PREFIX](#) value, the [ORCE Organization Descriptor \(L50\)](#), and [ORCE_REGISTRY_SERVICE_SUFFIX](#) setting to build the URL for communication with Customer Engagement.

ORCE log: Order Administration logs the Customer Engagement transactions passed between Order Administration and Customer Engagement in the [Trace Log](#) if its [Logging Level](#) is set to **DEBUG**.

Web service authentication? If the web services used to process inbound messages to Customer Engagement require web service authentication, you must provide a valid web service authentication client ID and client secret for the ORCE Registry entry in [Working with Web Service Authentication \(WWSA\)](#). OAuth is required. See **Oracle Retail Omnichannel**

Web Service Authentication Configuration Guide on My Oracle Support (2728265.1) for more information.

See the **Customer Engagement Batch Processing and Web Services Guide** for more information on the Customer Engagement API interface.

Working with Error Order Batches

Topics in this part:

- [Introducing Order Batches](#) describes the process of working with batched orders from a high-level point of view.
- [Working with an Order Batch](#) describes how to review, correct, and accept orders received from an external system that are in error.
- [Performing Batch Order Entry](#) describes how to work with the individual orders in the batch.
- [Accepting or Rejecting the Order Batch](#) describes how to release the individual orders in a batch on the system once the batch is in balance or how to reject the entire batch, if necessary.

Introducing Order Batches

You can work with the following types of order batches.

- [Batch Orders and Web Orders](#)
- [Batch Orders and Membership Orders](#)

Batch Orders and Web Orders

Web orders that fail the order edit: If an order received through the *Generic Order Interface (Order API)* does not pass the order edit, or if it does not include payment information, it is retained in the [Default Batch for E-Commerce Orders in Error \(G41\)](#). However:

- If the *order_channel* is P and the order is not part of a batch, the system places the order in the [Batch Number for Retail Channel Orders \(I78\)](#) if it has errors.
- If a retail pickup or delivery order does not pass the order edit, it is retained in the [Order Broker Error Batch Number \(K90\)](#). If this system control value is blank, retail pickup and delivery orders in error are assigned to the same batch as e-commerce orders in error. See [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for background.

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

To correct web orders in error: You can use batch orders to review, work with, and approve web orders that failed the order edit. Select Edit/Accept on the [Work with Error Orders Batches Screen](#) to edit the order batch. The system runs the same order edit that is performed when you receive orders through the *Generic Order Interface (Order API)*. When an order passes the order edit, the system removes the batch number from the order, updates its status to open, performs pick slip preparation, and makes it available in regular order maintenance and inquiry. If an order fails the order edit, the system includes the order on the [Print Remote Order Errors Report](#) and retains the order in an error status in the order batch.

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

Batch Orders and Membership Orders

Membership orders that fail the order edit: If a membership order generated through [Generating Membership Orders \(EGMO\)](#) does not pass the order edit, the order remains in a suspended status and is placed in a generated order batch, using the next number in the *Order Batch (A01)* number assignment wheel.

To correct membership orders in error: You can use batch orders to review, work with, and approve membership orders that failed the order edit. Select Edit/Accept on the [Work with Error Orders Batches Screen](#) to edit the order batch. The system runs the same order edit that is performed when you receive orders through the *Generic Order Interface (Order API)*. When an order passes the order edit, the system removes the batch number from the order, updates its status to open, performs pick slip preparation, and makes it available in regular order maintenance and inquiry. If an order fails the order edit, the system includes the order on the [Print Remote Order Errors Report](#) and retains the order in an error status in the order batch.

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

Working with an Order Batch

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

Web orders: If an order received through the *Generic Order Interface (Order API)* does not pass the order edit, or if it does not include payment information, the system places the order in an order batch; see [Batch Orders and Web Orders](#). Select Edit/Accept on the [Work with Error Orders Batches Screen](#) to edit and approve the batch. Even if the batch is error-free, you will still need to approve it manually.

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

In this topic:

- [Default Values for Orders Screen \(Selecting Error Order Batches\)](#)
- [Work with Error Orders Batches Screen](#)
- [Work with Orders within a Batch Screen](#)

Default Values for Orders Screen (Selecting Error Order Batches)

Purpose: Use this screen to advance to the Work with Error Order Batches screen.

About this screen: Each field on this screen is described in [Setting Defaults in Order Entry](#); however, you must select the *Error order batches* field to select to work with orders in error. Entries to the other fields on this screen are optional.

Work with Error Orders Batches Screen

Purpose: This screen displays the order batches in the system that contain orders in error. The value in the *Assigned to user* field controls which batches display. If blank, this screen lists all the order batches in the system.

Threshold: The Suspended Batches threshold value controls the length of time in which a suspended order batch remains on the system. Any order batches beyond this threshold are deleted automatically during a periodic process.

User ID: This screen also displays the user ID of the person currently working with an order batch. Only one person can work on a batch.

Screen use: Use this screen to:

- Work with an order batch. Orders in the batch remain in a suspended status until you accept the batch. For each order batch, you can:
 - Edit and accept the orders in the order batch.
 - Reject an order batch.
 - Add, delete, or work with an order in the batch at the [Work with Orders within a Batch Screen](#).
- Review, work with, and edit orders received through the *Generic Order Interface (Order API)* that did not pass the order edit or do not include payment information; see [Batch Orders and Web Orders](#).
For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).
- You can select Edit/Accept to edit the order batch. The system runs the same order edit that is performed when you receive orders through the *Generic Order Interface (Order API)*.
For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

When an order passes the order edit, the system removes the batch number from the order, updates its status to open, performs pick slip preparation, and makes it available in regular order maintenance and inquiry. If an order fails the order edit, the system includes the order on the [Print Remote Order Errors Report](#) and retains the order in an error status in the order batch.

How to display this screen:

1. Select *Error order batches* on the [Default Values for Orders Screen \(Selecting Error Order Batches\)](#).
2. Select OK to display the Work with Error Order Batches screen.

Field	Description
Assigned to user	The user ID of the person who created the order batch. All order batches display if this field is blank. The system assigns your default user to orders received through the <i>Generic Order Interface (Order API)</i> that contain errors. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). <i>Alphanumeric, 10 positions; optional, assigned by the system.</i>

Field	Description
Batch suspended	Indicates whether the screen lists only suspended batches or all batches. The system suspends a batch if the keyed cash and/or order controls do not match the actual cash and/or order controls. Valid values include: - Selected = (default): Display only suspended (unbalanced) batches. - Unselected = Display balanced and unbalanced batches. The system default is to display only the unbalanced batches because these batches need to be worked on. You must enter (or continue to enter) orders for the batch, adjust the cash or order controls for the batch or correct the orders in the batch to bring the batch into balance. If you select this field, every batch currently on the system is listed.  Note: A threshold value controls the length of time in which an order batch remains on the system. After this period, the system deletes order batches automatically during a periodic process.
Batch #	The number assigned by the system to a group of orders within an order batch. Web orders: If an order received through the <i>Generic Order Interface (Order API)</i> does not pass the order edit, or if it does not include payment information, it is retained in the Default Batch for E-Commerce Orders in Error (G41). However: - If the <i>order_channel</i> is P and the order is not part of a batch, the system places the order in the Batch Number for Retail Channel Orders (I78) if it has errors. - If a retail pickup or delivery order does not pass the order edit, it is retained in the Order Broker Error Batch Number (K90). If this system control value is blank, retail pickup and delivery orders in error are assigned to the same batch as e-commerce orders in error. See Retail Pickup (including Ship-for-Pickup) or Delivery Orders for background. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). <i>Numeric, 5 positions; display-only, assigned by the system.</i>
Date	The date on which the order batch was created. <i>Numeric, 6 positions (in user date format); display-only, assigned by the system.</i>
# orders	The number of individual orders assigned to the order batch, regardless of order status and including orders that have been processed and no longer display in the batch. The system includes all orders whose <i>Batch #</i> field in the Order Header table matches the order batch number. <i>Numeric, 5 positions; display-only.</i>

Field	Description
\$ value	The total dollar amount of orders entered for this batch during Order Entry. The system updates this field as you enter and accept each order in the batch. <i>Numeric, 13 positions with a 2-place decimal.</i>
In use by	The user ID of the person currently working with the batch. Only one person at a time can access a batch. If the batch is locked by another user because, for example, the user's session ended unexpectedly, you can use Unlocking a Stranded Order or Batch (MULO) to unlock the batch. <i>Alphanumeric, 10 positions; display-only, updated by the system.</i>

Screen Option	Procedure
Review, delete or enter orders for the batch	Select Work with Orders for a batch to display the Work with Orders within a Batch Screen .
Reject and remove the entire batch	Select Reject for a batch to reject and delete the batch. Select OK at the Confirm Reject Window to perform this action. See Accepting or Rejecting the Order Batch .
Run the order edit batch program and print the Print Remote Order Errors report for an order batch	Select Edit/Accept for an order batch to run the order batch edit and print the Print Remote Order Errors Report . See Accepting or Rejecting the Order Batch for the updates that occur.

Work with Orders within a Batch Screen

Purpose: Use this option to:

- Review the orders assigned to the batch
- Delete an order from the batch
- Work with an order in the batch
- Review the order totals for an order in the batch
- Add an order to the batch

How to display this screen: Select Work with Orders for an order batch at the [Work with Error Orders Batches Screen](#).

Field	Description
Batch#	The number assigned by the system to a group of orders within an order batch. <i>Numeric, 5 positions; display-only, assigned by the system.</i>

Field	Description
Sts Order status	The status of the order, as assigned by the system. Batched orders may have a Suspended, Open or Quote status. Suspended/Error Batched orders are suspended in an error status until the errors are corrected. When you correct the errors on an order, the status of the order in the batch changes to Open. Open Pick slips may be printed for orders in an open status. Additionally, these orders are available for maintenance and inquiry. Quote If the <i>Quote</i> field for the order type on the order is selected, the system considers the order a pre-order quote and not a standard order. Quotes in a batch are entered in a Quote status and remain in a Quote status until you convert the quote to an order in Quote Maintenance. See Entering Pre-Order Quotes for an overview. Other status codes are: Held, Cancelled or Closed. <i>Alphanumeric, display-only, updated by the system.</i>
Order #	A unique number assigned by the system to identify an order. <i>Numeric, 8 positions; display-only.</i>
Ord date	The date the order was created. <i>Numeric, 6 positions (in user date format); display-only.</i>
Sold to	The last name, first name and initial or the company name of the customer who placed the order. <i>Alphanumeric, 41 positions; display-only.</i>
#Rcp	The number of recipients for this order, which indicates the number of different shipping addresses associated with the order number. The system assigns a sequential ship-to number to every order, even if the shipping address and the sold-to address are the same. <i>Numeric, 3 positions; display-only.</i>
Total paid	The dollar amount you received from the customer on all prepaid (cash/check payments) for the order. <i>Numeric, 20 positions with a 2-place decimal; display-only.</i>
Pmt	Indicates whether a payment method exists on the order. - Y = A payment method exists on the order. - N = A payment method does not exist on the order. <i>Alphanumeric, 1 position; display-only.</i>

Screen Option	Procedure
Delete an order from the batch	Select Delete for the order to delete it. The system writes a record in the Deleted Order Table for the order.
Go into an order in the batch to change or verify order information before you accept the entire batch	Select Ship To's for an order listed for the batch to advance to Order Entry (in "review" mode). You must accept or reject the order when you are through.
Review the order totals for the order	Select Display order totals for the order to display the Display Order Totals Window .

Screen Option	Procedure
Enter another order for the batch	Select Create. See Performing Batch Order Entry for more information about the batching process during Order Entry. See also Entering Orders for details on how to enter an order.

Performing Batch Order Entry

Purpose: This topic describes the differences you see during Order Entry when you work with an order in an order batch. This topic identifies the screen differences on each major Order Entry screen during Batch Order Entry. The screens display this way only if you select the *Error order batches* field at the [Default Values for Orders Screen \(Selecting Error Order Batches\)](#).

Only the fields and command keys that apply to Batch Order Entry are described in this topic.

Refer to [Entering Orders](#) for field-by-field descriptions and instructions for performing Order Entry. Whether entering batched or unbatched orders, this process remains the same.

When you complete the Batch Order Entry process, which means that you update and accept each order in the batch, you must accept the entire batch to release these orders on the system. See [Accepting or Rejecting the Order Batch](#) if you have completed the orders in the batch and wish to process or delete the batch.

In this topic:

- [Select Customer Sold To For Order Screen](#)
- [Work with Order Screen \(Batch Order Entry\)](#)
- [Completing Order Entry](#)

Select Customer Sold To For Order Screen

Purpose: Use this screen to specify the customer for the order in the order batch, by:

- Entering the customer number, if you know it, *or*
- Entering information in any of the scan fields to obtain a list of customers who closely match this information, *or*
- Selecting Create to enter an order for a new customer.

How to display this screen: Select Create at the [Work with Orders within a Batch Screen](#).



Note:

If the [ORCE Customer Integration \(L37\)](#) system control value is set to INTERACT, you advance instead to the [Customer Scan Screen](#).

About this screen: This screen is described fully in [Selecting Customers in Order Entry](#); however, in batch order entry the [Batch #](#) field is listed at the top of the screen to indicate that you are entering orders for a batch.

Field	Description
Batch #	The batch number for which you are entering the current order. The batch number is a number assigned by the system to a group of orders. <i>Numeric, 5 positions; display-only, assigned by the system.</i>

Screen Option	Procedure
Review or update defaults for several Order Entry fields	Select Change Defaults to display the Change Defaults pop-up window. See Setting Defaults in Order Entry .
Enter an order for a new customer	Select Create to advance to the Work with Order screen. See Entering Orders .
Review the orders already entered in the batch	Select Maintain to display the Work with Orders within a Batch Screen .

Work with Order Screen (Batch Order Entry)

Purpose: The following screens identify the differences in the Order Entry screens when batching orders. See [Entering Orders](#) for a complete discussion and a sample of these screens.

Field	Description
Batch#	The batch number for which you are entering the current order. The batch number is a number assigned by the system to a group of orders. <i>Numeric, 5 positions; display-only, assigned by the system.</i>

Completing Order Entry

Purpose: You return to the [Work with Orders within a Batch Screen](#) when you accept or reject each order in the batch.

Select one of the following options on the [Work with Error Orders Batches Screen](#) when you finish working with the orders in the batch:

- Select Edit/Accept to accept all the orders in the batch.
- Select Reject to reject and delete the entire batch.

See [Accepting or Rejecting the Order Batch](#) if you are through entering the entire batch.

Accepting or Rejecting the Order Batch

Purpose: This topic describes the processes that the system performs when you select Edit/Accept for a batch to accept the entire batch or you select Reject Batch for a batch to reject and delete the batch.

In this topic:

- [Rejecting the Batch](#)
- [Accepting the Batch](#)
- [Performing Online Credit Card Authorizations](#)

- [Accepting an Order in the Batch](#)
 - [Immediate Updates](#)
 - [Updates at Accept](#)
 - [Updates During Background Processing](#)
- [Accepting the Entire Batch](#)
 - [Updates at Accept](#)
 - [Updates During Background Processing](#)

When to accept or reject: You accept or reject a batch of orders when you finish entering the individual orders in a batch; see [Performing Batch Order Entry](#).

Rejecting the Batch

You may want to reject an order batch if the order batch contains orders that you wish to delete.

Select [Reject Batch](#) to reject and delete the batch. You advance to the [Confirm Reject Window](#). Select OK to reject the batch.

The system prints the [Rejected Batch Listing](#), deletes the orders from the system, and deletes the batch itself.

Deleted Order table: The system writes a record in the Deleted Order Table for each purged order.

If the batch includes a retail pickup or delivery order from Order Orchestration, the BROKER process sends a status update rejecting the order; also, it deletes the related Order Orchestration and Order Orchestration History records. See [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for an overview.

Accepting the Batch

Select [Edit/Accept](#) on the [Work with Error Orders Batches Screen](#) to edit the order batch. The system runs the same order edit that is performed when you receive orders through the Generic Order Interface (Order API) and includes any orders in error on the [Print Remote Order Errors Report](#).

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

When an order passes the order edit, the system removes the batch number from the order, updates its status to open, performs pick slip preparation, and makes it available in regular order maintenance and inquiry.

If an order fails the order edit, the system includes the order on the [Print Remote Order Errors Report](#) and retains the order in an error status in the order batch. Select [Work with Orders](#) for the order batch to advance to the [Work with Error Orders Batches Screen](#) where you can review and correct the errors on each order. When you have finished updating each order, select [Edit/Accept](#) again to edit and accept the remaining orders in the order batch.

Performing Online Credit Card Authorizations

Online credit card authorization allows you to send and receive electronically the information required to authorize a credit card at the time the order is placed instead of at the time the pick slip is generated for the order.

The system performs online authorization when you accept an order batch after determining if any order in the batch should go on hold.

If an order in the batch is eligible to receive a credit card authorization during batch order entry, the system sends the amount requiring authorization to the authorization service and waits for a response.

There are 3 types of responses you can receive from the authorization service.

- R = an authorization response was received, such as declined or approved.
- T = the program timed out before an authorization response was received.
- U = an undefined response was received.

Additionally, if an authorization response is received, the authorization service sends back an authorization response code, AVS response code (if performing address verification), card security response code (if performing credit card security identification), authorization code, and date.

If a hold reason code has been defined for the vendor response, AVS response, or CID response received, the system places the order on hold.

Credit cards requiring authorizations less than \$1.00: If the credit card amount to authorize is less than \$1.00 and you have defined an authorization number in the [Authorization Number for Authorizations Under \\$1.00 \(I08\)](#) system control value, the system does not send the credit card to the service bureau for authorization and instead assigns the authorization number from the system control value to the credit card. If an authorization number is not defined in this system control value, the system sends the credit card to the service bureau for authorization, regardless of the amount that requires authorization.

Performing Online Verification Only: If the [Online Auth Verification Only \(I96\)](#) system control value is selected, the system processes online authorizations for \$1.00 for the purpose of validating the card. During batch authorizations, the system authorizes the card for the shippable dollar amount and voids the online authorization for \$1.00.

For more information: See [Performing Online Credit Card Authorizations](#) for an overview of the online credit card authorization process and the required setup.

Accepting an Order in the Batch

Purpose: The system performs updates to a number of tables to reflect the addition of a new order to the batch. The updates occur:

- Immediately, as you enter an order to the batch.
- When you accept the order or accept the order and add a recipient order.
- During a background processing job (ORDR_ASYNC).

Immediate Updates

The system updates the SKU and Item/Warehouse tables immediately as you enter a new order to the batch.

Process	Table	Field
Update the Item/Warehouse record for each item ordered	Item/ Warehouse	On hand qty (if express-billed order) ITW B/O qty Reserve qty S/H reserve qty ITW On order qty

Process	Table	Field
Update the SKU record	SKU	SKU Orders avail pick gen SKU Open qty SKU On hold qty

Additionally, the system updates the following tables as you enter a new order:

- Customer Sold To
- Customer Sold To Extended Address
- Customer Sold To Phone #
- Customer Bill To
- Customer Bill To Extended Address
- Customer Bill To Phone #
- Customer Ship To
- Customer Ship To Extended
- Customer Ship To Phone #
- Customer Action Notes
- Order Additional Charges
- Order Detail
- Order Detail Data Queue
- Order Free Gift
- Order Header
- Order I/T Lines
- Order Information
- Order Line History
- Order Line Messages
- Order Messages
- Order Payment Method
- Order Pending Checks
- Order Selected Item
- Order Ship To
- Order Ship To Address
- Order Ship To Data Queue
- Order Special Handling
- Order Transaction History
- Reserved Order Lines

Updates at Accept

The system performs these table updates when you accept each order in the batch.

Process	Table	Field
Reprice order if the <i>Pricing method</i> field in the Source Code record is set to a Reg Plus Reprice	Order Detail	ODT Price
Evaluate free gift eligibility, based on the source code or offer; create order detail records for free gift, if applicable	Order Detail	All fields
Calculate the \$ Discount, based on Source or Offer; add a record to the Order Additional Charges table	Order Additional Charges	All fields
Sends balance of updates to background processing job (O/P ASYNC)		

Order transaction history: When you accept an order that is part of an order batch, the system writes an order transaction history message with a *Type* of Maintenance indicating the user that accepted the order. The system writes an order transaction history message each time a user accepts the order so that you can track the users that changed the order in the batch prior to accepting the order batch. You can review order transaction history messages on the [Display Order History Screen](#).

An example of the order transaction history message the system creates when a user accepts an order that is part of an order batch is displayed below. The system includes an amount regardless of whether the change updated the order total.

Date	Type	Transaction Note	Amount	User
8/14/14	MAINT	Order changed while in unaccepted batch	45.00	SFLYE



Note:

The system does not create an order transaction history message if a user rejects out of an order that is part of an order batch. If a user accepts an order in order maintenance that is no longer part of an order batch, the system writes an order transaction history message indicating: `Order was maintained.`

Additional updates when you accept the entire batch: The system performs these updates to the individual orders in the batch only when you accept the entire batch (see [Accepting the Entire Batch](#)):

- Perform the credit check processes
- Evaluate for refund eligibility
- Update the Flash Report
- Evaluate and update the order status based on the detail line status, if necessary
- Update the Online Authorization, Authorization History, and Void Authorization tables if you performed online credit card authorization

- Applies pick slip preparation to each eligible order; see [Applying Pick Slip Preparation to an Order](#)

Updates During Background Processing

The system performs the balance of the field and table updates during a background processing job (O/P ASYNC) that runs after you accept each order in the batch.

Process	Table	Field
Update the Price Override Reason table, based on price overrides at detail line level	Price Override Reason	POR # of overrides POR Total discount
Update the SKU record	SKU	Date of first order Date of last order
Update the SKU/Price History record	SKU Price History	SPH # orders SPH \$ orders
Update the SKU/Offer Page record for offer page analyses	SKU/Offer Page	Dollars ordered CTD Dollars ordered WTD Dollars sold out CTD Dollars sold out WTD Units ordered CTD Units ordered WTD Units sold out CTD Units sold out WTD SOP Dollars upsell CTD SOP Dollars upsell WTD SOP Units upsell CTD SOP Units upsell WTD SOP Units lost CTD SOP Units lost WTD
Update the Order/Billing History record	Order/Billing History	OBH # Orders OBH \$ Order total OBH Qty ordered OBH # Orders sold out OBH \$ Sold out total OBH Qty sold out
Add a record to the Soldout Notifications table to generate soldout notifications for sold-out items	Soldout Notifications	
Update the sold-to customer record	Customer Sold To Order History	COH On order \$ COH # Orders LTD COH # Sold outs LTD COH \$ Orders LTD COH \$ Sold outs LTD COH Last Card Number COH Active since date COH Last order date OTY Order type PAY Pay type SRC Source code

Process	Table	Field
Update the ship-to customer record	Customer Ship To Order History	HOH On order \$ HOH # Orders LTD HOH # Sold outs LTD HOH \$ Orders LTD HOH \$ Sold outs LTD HOH Active since date HOH Last order date OTY Order type PAY Pay Type SRC Source code
Update operator statistics, based on order type	Order Type/ User	OTU # Orders TD OTU # Orders LTD OTU \$ Value - TD OTU \$ Value - LTD OTU # Receipts TD OTU # Recips LTD OTU # Lines TD OTU # Lines LTD
Update operator statistics by accounting period, based on order type	Order Type/ User History	OUH # Orders OUH \$ Value OUH # Recips OUH # Lines
Update the source code record with the accumulated order totals	Source	\$ Orders \$ Soldouts # of Orders # of Soldouts

Accepting the Entire Batch

Purpose: The system updates several tables:

- When you accept the entire batch
- During a background processing job that runs automatically after you accept a batch or an order in the batch

See [Working with the ORDR_ASYNC Job](#) for more information on the background jobs.

Updates at Accept

The system performs these table updates when you accept the batch. See [Performing the Release](#) and [Introducing Order Hold Reason Codes](#) for more information about the credit check process that evaluates customers, orders, and payment types and performs record updates if any condition on the order fails a credit check.

Process	Table	Field
Credit check: sold-to customer unconditional hold	Order Header SKU	OHD OHR Sys hold reason SKU On hold qty

Process	Table	Field
Credit check: sold-to customer fraud	Order Header	OHD Order status
	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty
Credit check: sold-to customer zip code fraud	Order Header	OHD Order status
	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty
Credit check: bill-to customer unconditional hold	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty
Credit check: bill-to customer zip code fraud	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty
Credit check: ship-to/ sold-to customer fraud	Order Ship To	OST OHR Hold reason
	Order Header	OHD OHR Sys hold reason
	Order Ship To	OST Order status
	SKU	SKU On hold qty
Credit check: ship-to/ sold-to customer zip code fraud	Order Ship To	OST Order status
	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty
Credit check: ship-to customer fraud	Order Ship To	OST Order status
	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty
Credit check: ship-to customer zip code fraud	Order Ship To	OST Order status
	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty
Credit check: dollar hold	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty
Credit check: time hold	Pay Type	OHR Hold reason
	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty
Credit check: check fraud	Pay Type	OHR Hold reason
	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty
Credit check: balance due exceeds the \$ amount	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty
Credit check: pay types	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty
Credit check: credit card fraud	Pay Type	OHR Hold reason
	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty
Credit check: credit card authorization pending status	Pay Type	OHR Hold reason
	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty
Credit check: outstanding balance due	Pay Type	OHR Hold reason
	Order Header	OHD OHR Sys hold reason
	SKU	SKU On hold qty

Process	Table	Field
Credit check: email address fraud	Order Header Order Ship To SKU	OHR Hold reason OHD OHR Sys hold reason SKU On hold qty
Evaluate order for refunds; create refund records for overpayments or balance dues	Refunds	All fields
Update the Operations Control Summary (Flash) Report	Order Control Summary	# Orders entered \$ Orders entered Quantity ordered # Orders soldout/clsd \$ Orders soldout Quantity soldout \$ Open backordered Quantity backordered \$ Held backordered Qty held backordered
Update order header and order ship-to status to match status of detail lines if all lines canceled.	Order Header Order Ship To	OHD Order status OST Order status
Approved online credit card authorization: Create an online authorization record, authorization history record, and void authorization record if you performed online credit card authorization for a credit card payment method on the order	Online Authorization Authorization History Void Authorization	Online Authorization: company order # seq # auth amount vendor response 1(auth response) vendor response 2 (CID response) auth # auth date status: *UPDT trans seq # card number terminal # AVS result card security value ASV auth service Authorization History: All fields except Amount Deposited Void Authorization: All fields

Process	Table	Field
Declined online credit card authorization: Create an online authorization record and authorization history record if you performed online credit card authorization for a credit card payment method on the order	Online Authorization Authorization History	Online Authorization: company order # seq # auth amount vendor response status: *SENT trans seq # card number terminal # ASV auth service Authorization History: All fields except Amount Deposited, Auth Date, and Auth #
Undefined online credit card authorization response: Create an online authorization record and authorization history record if you performed online credit card authorization for a credit card payment method on the order	Online Authorization Authorization History	Online Authorization: company order # seq # auth amount vendor response auth # auth date status: *UPDT trans seq # card number terminal # ASV auth service Authorization History: All fields except Amount Deposited
Online credit card authorization communication failure: Create an online authorization record and authorization history record if you performed online credit card authorization for a credit card payment method on the order	Online Authorization Authorization History	Online Authorization: company order # seq # auth amount auth # auth date status: *UPDT trans seq # card number terminal # ASV auth service Authorization History: All fields except Amount Deposited, Auth Date, Auth #, and Vendor Response

Process	Table	Field
Clear order batch number: If the order is a membership order, an e-commerce order or a retail order, the system clears the order batch number upon acceptance. Determined by: - membership order: Clears the order batch number if there is a Membership ID on the Order Header - e-commerce order: Clears the order batch number if the order batch number matches the Default Batch for E-Commerce Orders in Error (G41) - retail order: Clears the order batch number if the order batch number matches the Batch Number for Retail Channel Orders (I78)	Order Header	OBA Batch #
For a retail pickup or delivery order, sends a status update to Order Orchestration to change the status in Order Orchestration to Accepted. Also, change the status of the Order Orchestration record to In process. See Retail Pickup (including Ship-for-Pickup) or Delivery Orders	Order Orchestration	Status
Create pre-generated picks	Pick Control Header Pick Control Detail Pick Control Label Pick Stored Value Card	See Applying Pick Slip Preparation to an Order for the updates that are performed

Updates During Background Processing

The system performs the balance of the field and table updates during a background processing job (ORDR_ASYNC) that runs after you accept the entire batch.

Process	Table	Field
Update the Price Override Reason table, based on price overrides at detail line level	Price Override Reason	POR # of overrides POR Total discount
Update the SKU record	SKU	Date of first order Date of last order
Update the SKU/Price History record	SKU Price History	SPH # orders SPH \$ orders

Process	Table	Field
Update the SKU/Offer Page record for offer page analyses	SKU/Offer Page	Dollars ordered CTD Dollars ordered WTD Dollars sold out CTD Dollars sold out WTD Units ordered CTD Units ordered WTD Units sold out CTD Units sold out WTD SOP Dollars upsell CTD SOP Dollars upsell WTD SOP Units upsell CTD SOP Units upsell WTD SOP Units lost CTD SOP Units lost WTD
Update the Order/Billing History record	Order/Billing History	OBH # Orders OBH \$ Order total OBH Qty ordered OBH # Orders sold out OBH \$ Sold out total OBH Qty sold out
Add a record to the Soldout Notifications table to generate soldout notifications for sold-out items	Soldout Notifications	
Update the sold-to customer record	Customer Sold To Order History	COH On order \$ COH # Orders LTD COH # Sold outs LTD COH \$ Orders LTD COH \$ Sold outs LTD COH Last Card Number COH Active since date COH Last order date OTY Order type PAY Pay type SRC Source code
Update the ship-to customer record	Customer Ship To Order History	HOH On order \$ HOH # Orders LTD HOH # Sold outs LTD HOH \$ Orders LTD HOH \$ Sold outs LTD HOH Active since date HOH Last order date OTY Order type PAY Pay Type SRC Source code

Process	Table	Field
Update operator statistics, based on order type	Order Type/ User	OTU # Orders TD
		OTU # Orders LTD
		OTU \$ Value - TD
		OTU \$ Value - LTD
		OTU # Recips TD
		OTU # Recips LTD
		OTU # Lines TD
		OTU # Lines LTD
Update operator statistics by accounting period, based on order type	Order Type/ User History	OUH # Orders
		OUH \$ Value
		OUH # Recips
		OUH # Lines
Update the source code record with the accumulated order totals	Source	\$ Orders
		\$ Soldouts
		# of Orders
		# of Soldouts

Order Creation Errors

Purpose: The following table describes errors that can occur when you create orders through the order API. These errors might be included in the *Detailed Order XML Response* (CWORDEROUT) if the response_type in the *Inbound Order XML Message* (CWORDERIN) is E.

For more information see *Generic Order Interface (Order API)* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).



Note:

Special characters (such as < or >) are replaced in the outbound message.

The list of errors is also applicable to orders that can occur when you create orders in Modern View order entry.

For more information on order entry errors in Modern View see [Order Error Handling](#).

Code	Error	Explanation
01	Entered Price Exceeds Lim	The requested price of a new or existing item is below the maximum discount percentage, as specified in the Price Override Limit Percent (E55) system control value. For example, if this system control value specifies a limit of 10%, and the requested price of an item was 15% below the regular price, this would produce an error.
 Note: This error based on the setting of the Override Price Override Limit (A64) secured feature:		
		- if there is a valid <i>entered_by_user</i> specified in the message, the system checks the secured feature authority of that user; - otherwise, if the <i>entered_by_user</i> is not a valid user ID in Order Administration, or if there is no <i>entered_by_user</i> specified in the message, the system checks the secured feature authority of your default user.
A0	Invalid Promotion Code	The promotion code specified in the message does not actually exist. See the Allow Manual Entry of Promotion Code (I63) system control value for more information.
A1	Multiples error	The order line quantity is not evenly divisible by the <i>Sell quantity</i> for the item/SKU.
A4	Price is zero	No price was found for the item/offer, but the item is not eligible for a price override to zero.
A7	Item not valid for whs	The <i>line_warehouse</i> indicated for a return or express bill does not exist.
A8	Invalid line frt override	A line freight override is indicated, but the freight method on the order is not a line-level freight method.
A9	S/H code is invalid	The S/H code (Special handling code) specified for the item is invalid.
B1	Restricted item/SKU	The Restrict flag for an item on the order is selected.
B2	SKU does not exist	The short SKU specified in the message is not associated with a valid SKU.
B3	Base item does not exist	The system cannot identify the item/SKU for an order detail line based on the information provided in the message.
B4	Discount limit exceeded	The discount on the order ship to exceeds the Order Discount Percentage Limit (D16) system control value.
BZ	Invalid Additional Charge	The <i>additional_charge_code</i> is not a valid additional charge code in the Additional Charge table.
C0	Invalid offer	The item specified is associated with an invalid offer.
C1	Item/Cust cls restriction	The customer's class is restricted from shipment of items of this item class, as defined through the Item Class Restrictions by Customer Class Screen (Working with Restrictions) .
C3	S/H code not allowed	Special handling is not allowed for the item, as defined at the Create Item Offer Screen or the Create SKU Offer Screen .

Code	Error	Explanation
C4	Invalid/Missing Cust Cls	There is no valid customer class indicated in the message, the Default Customer Class in Order Entry (D63) system control value is blank, and the Require Customer Class (H85) system control value is selected.
C5	Gift wrap not allowed	The <i>gift_wrap</i> field is selected and gift wrapping is not allowed for the offer.
C8	Invalid Ship Via	- The <i>Require postal code?</i> flag is selected for the country and the ship via specified for the order does not exist, OR - There is an invalid <i>line_shipping_method</i> specified for an item on the order, OR - The order represents a pre-order quote (the <i>Quote</i> field for the order type is selected) and the ship via entered on the quote is an express bill ship via.
D3	Price does not exist for item source.	The source code uses special pricing by source, and special pricing is not defined for the item. See Working with Special Pricing by Source Code (WSPP) for more information.
D4	Multiple CCs with \$0	There is more than one “catch-all” payment method. See Enter Payment Method Screen for more information.
D8	Missing Whse/ Loc-No IT Ln	The <i>line_warehouse</i> or <i>location</i> indicated for a return or express bill does not exist. You must delete the entire order and re-enter it.
E2	State not found	The state is not valid for the country, as defined through Setting Up the Country Table (WCTY) . If a state is specified, it must be a valid state for the country, regardless of the setting of the <i>Require state?</i> flag for the country.
E3	Order qty > max allowed	The item quantity exceeds the maximum specified in the Maximum Order Quantity (C60) system control value.

 Note:

This error based on the setting of the [Allow Maximum Order Quantity Override \(A70\)](#) secured feature:

- if there is a valid *entered_by_user* specified in the message, the system checks the secured feature authority of that user;
- otherwise, if the *entered_by_user* is not a valid user ID in Order Administration, or if there is no *entered_by_user* specified in the message, the system checks the secured feature authority of your default user

Code	Error	Explanation
E5	Line \$value > max allowed	The extended price of the order detail line exceeds the limit specified in the Maximum Order Line Value (E98) .
 Note: This error based on the setting of the Allow Maximum Order Line Value Override (A69) secured feature:		
E6	Price can not be negative	- if there is a valid <i>entered_by_user</i> specified in the message, the system checks the secured feature authority of that user; - otherwise, if the <i>entered_by_user</i> is not a valid user ID in Order Administration, or if there is no <i>entered_by_user</i> specified in the message, the system checks the secured feature authority of your default user
E7	Multiple CC with pay plan	- The item has a price that is negative and the Allow Negative Prices in Order Entry (E97) system control value is not selected, OR - The order represents a pre-order quote (the <i>Quote</i> field for the order type is selected) and the quantity for an item on the quote is a negative quantity.
E8	CC Pmt Req w/ Store Ship	There is more than one credit card on an order that includes a flexible payment option. See Deferred/Installment Billing Overview for more information.
		There is no credit card payment method specified for a store shipment request.
 Note: Store fulfillment is not currently implemented.		
E9	Email invalid	The email address is not properly formatted. See Email Address Validation for more information.
EM	Exceeds maximum char	The personalization text exceeds the maximum specified for the custom special handling format. See the <i>personalization_line</i> element in the <i>Inbound Order XML Message (CWORDERIN)</i> for more information. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
F5	Inv qty for ShipToStore	There is a ship-alone item with a quantity greater than one on a ship-for-pickup order. See Ship-for-Pickup Orders for background.
F8	Item Ctry/St Restriction	The item is restricted from shipment to that country or state, as defined through the Work with Item Restriction by Country/State Screen .
F9	Ship Via invalid for Item	The shipper is not eligible to ship the item to its destination, based on the Item Ship Via Override table. See Working with Item Ship Via Overrides .

Code	Error	Explanation
G5	Invalid Prefix Code	Not currently implemented.
GA	SH Resp fail defined rule	The custom special handling for the item does not conform to a rule set up for the custom special handling format. See Work with Special Format Rules Screen for background.
H2	Invalid Flexible Payment	There is an invalid flexible payment option specified for an order payment method. See Flexible Payment Options for more information.
I1	Duplicate item for cust	The Duplicate Item Check (C09) system control value is selected and an item is included on more than one order for the customer within the number of days specified in the Duplicate Item Days (C58) system control value.

 **Note:**

After you accept or edit the order batch that includes the order with the duplicate item, the error status of the order line(s) is cleared, and the system does not reevaluate the order for a duplicate item error.

I2	Invalid Card Issue#	An issue number is required for the credit card pay type (based on the Require issue # flag), but an issue number was not provided. See Working with Pay Types (WPAY) for more information.
I3	Bill Me Later trans limit	Not currently implemented.
IM	Required Input missing	Required information is missing from the custom special handling instructions.
M1	Invalid email/opt in-SVC	There is a virtual stored value card on the order and a valid email address was not provided. The system requires an email address in order to send a Stored Value Card Notification email to the recipient of the stored value card. See Stored Value Card Email Hierarchy for more information.
NC	No catch all pay method	There is no payment method on the order with the <i>amt_to_charge</i> field blank.
OD	Invalid Order date	The accounting period associated with the date could not be found.
SA	Non-CC on Ship for Pickup	The Payment at POS for Ship for Pickup Orders (L60) system control value is selected, this is a ship-for-pickup order, the order type does not match the <i>Order Type for Special Orders (L15)</i> system control value, and the order includes a payment method that is not a credit card with a <i>Card type</i> of Credit.
S1	Store Fulfillment Loc Msg	No store_code was passed for a store pickup order. See Store Pickup Orders for more information.
S4	Store Fulfillment Subscrip	You cannot generate a store pickup request for a subscription item. See Store Pickup Orders for background.
S5	Store Fulfillment Mbrship	You cannot generate a store pickup request for a membership item. See Store Pickup Orders for background.

Code	Error	Explanation
S6	Store Fulfillment Neg Qty	You cannot generate a store pickup request for a negative quantity. See Store Pickup Orders for background.
S7	Invalid Store Code	The <i>store_code</i> passed to create a ship-for-pickup or store pickup order is not a valid code as set up through Work with Store Cross Reference (WSCR) . See Ship-for-Pickup Orders or Store Pickup Orders for background.
S8	Invalid Delivery Type	The <i>delivery_type</i> was not set to P (store pickup) or S (ship-for-pickup).
S9	Ineligible for Store Pick	The message indicates to create a store pickup order, but the order is not eligible. See Store Pickup Orders for more information. Possible reasons include: • a payment method that is not a credit card. • items on the order that are not flagged as <i>OROB eligible</i> • items on the order that have gift wrap or special handling instructions. • multiple ship to addresses exist on the order with pickup information. • the <i>store_code</i> indicated is invalid. If the <i>store_code</i> is invalid, then there are additional errors related to the ship-to address on the order.
SE	Email Missing/Ineligible	This is a store pickup order, and there is not an email address with an opt-in/out flag of O1 (all emails) or O2 (order-related emails) on the order. The email address and opt-in/out setting are required so that you can notify the customer when the order is ready for pickup at the selected store. See Store Pickup Notifications for more information.
SI	Sales Rep Inactive	The <i>Active</i> field for the <i>sales_rep_number</i> assigned to the order in the Salesman table is N. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
SJ	Sales Rep Store Inactive	The <i>Active</i> field for the <i>sales_rep_store</i> assigned to the order in the Store Cross Reference table is N. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
SK	Sales Rep Store Invalid	The <i>sales_rep_store</i> assigned to the order is not a valid store number in the Store Cross Reference table. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
VR	Input not valid response	The personalization text is not a valid entry for the custom special handling format. See the <i>personalization_line</i> element in the <i>Inbound Order XML Message (CWORDERIN)</i> for more information. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
W3	City Blank	No city is specified for the shipping address.
W4	Country Not Found	The country code is invalid or no country was specified.
W7 W8	Invalid Cancel Date Invalid Cancel/Arrival DT	The cancel date specified in the message is earlier than the current date.

Code	Error	Explanation
X0	Invalid date of birth	Not currently implemented.
X1	Invalid Order Hold Reason	The order hold reason code indicated does not exist in the Order Hold Reason table. See Establishing Order Hold Reason Codes (WOHR) for more information.
X2	Invalid Order Type	The order type indicated does not exist in the Order Type table. This error can also occur when the E-Commerce Order Type (G42) does not specify an order type and no order type was specified in the CWOOrderIn message. See Establishing Order Types (WOTY) for more information.
X3	Invalid Salesman Number	The Require Salesrep Number in Order Entry/Order Maintenance (E87) system control value is selected and the order does not have a valid sales rep.
X4	Invalid Ship Via for FEDX	There is a Federal Express tracking number indicated, but the ship via on the order does not have a <i>Type</i> of FX.
X5	Invalid Ship Via for POB	The ship via for the order does not deliver to P.O. boxes, as specified by the PO box delivery field for the ship via. This error can occur regardless of the setting of the <i>Perform ship via edit?</i> flag for the country.
X6	Invalid Ship Via for SCF	Either the SCF or the ship via/SCF combination is not valid. This error occurs only if the <i>Perform ship via edit?</i> flag is selected for the country.
X7	Invalid Source Code	The source code specified on an order detail line is not valid.
 Note: Normally, even if the source code on the header is not specified or is invalid or restricted, the system selects a valid header-level source code from the customer's mail history, current source code, or a system control value default. See the <i>source_code</i> for a discussion.		
For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).		
X9	Invalid State for Zip	The state is not valid for the postal code, as defined through Setting Up the Zip/City/State (Postal Code) Table (WZIP) .
Y0	Invalid social security #	Not currently implemented.
Y2	Last Name & Comp Blank	Both the last name and the company field for the sold-to customer are blank; at least one is required.
Y3	SCF not Found	The SCF is not valid for the country, as defined through Working with SCF Codes (WSCF) . This error occurs only if the <i>Require postal?</i> flag is selected for the country.
Y4	State Blank	No state is specified. This error occurs only if the <i>Require state?</i> flag is selected for the country.
Y5	Street Address Blank	No street address is specified.

Code	Error	Explanation
Y8	Zip Code Blank	No postal code is specified. This error occurs only if the <i>Require postal code?</i> flag is selected for the country.
Z0	Direct Disbursement N/A	Not currently implemented.
Z1	No Detail lines	No items were specified for the order.
Z2	No Paytypes for Order	No payment methods have been provided.
Z4	CC Expiration/ Start Date	If an expiration date is required for the credit card pay type (based on the <i>Require expiration date</i> flag): - the credit card payment method did not include a valid expiration date; for example, the <i>cc_exp_month</i> or <i>cc_exp_year</i> exceeded two positions each, or the <i>cc_exp_month</i> is not a valid month (1 through 12) - the expiration date is in the past - the expiration date is more than 20 years in the future if a start date is required for the credit card pay type (based on the <i>Require start date</i> flag), the credit card payment method did not include a start date. See <i>Working with Pay Types (WPAY)</i> for more information.
Z5	Invalid Credit Card	- No credit card number was provided for a credit card pay type. - The credit card number failed validation against the credit card length, leading digits, or bin number defined for the credit card pay type.
Z6	Invalid Pay Type	- No payment method was passed, or the payment method passed was invalid, OR - The order represents a pre-order quote (the <i>Quote</i> field for the order type is selected) and a cash/check pay type is defined on the quote.
Z7	Invalid Bill To Address	Some part or all of the bill-to information in the message is invalid. See Creating and Updating Bill-to Customers (WCBT) for more information.
Z8	Invalid Sold to Address	There is a problem with the sold-to customer's address. This error accompanies the error message indicating the specific problem.
Z9	Invalid Ship to Address	Any of the entries for the shipping address are invalid. This error appears with one or more other error messages describing the fields that are invalid.
ZZ	No Order I/T Line for Item	You attempted to send an express-billed order without specifying the warehouse and location where the item(s) were taken.

Order Entry Appendices

Purpose: The following topic provides reference information for use in sales tax calculation.

- Generic Tax API* describes using the generic tax API (TAX_INT process) to calculate tax using an external tax interface.
For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).
- [Avalara AvaTax Interface](#) describes the bridge between Order Administration and the Avalara AvaTax system, which you use for sales tax calculation and reporting.

- [Vertex Interface](#) describes the bridge between Order Administration and the Vertex Sales Tax Compliance System, which you use for sales tax calculation and reporting.
- [Experian Address Validation REST API](#) provides an overview and required setup to send Order Administration addresses to the Address Validation REST API for address cleansing and standardization.

12

System Operations

[Operating the Background Jobs](#)
[Running Period End Processing](#)
[Using the System Utilities](#)
[Setting Up Authorization Services](#)
[Purging Tables](#)
[Flexible Payment Options](#)
[Processing Deposits](#)
[E-Commerce Interface](#)
[Workflow Management](#)
[Point of Sale Integration](#)
[Stored Value Card Integration](#)
[Importing Item/SKU and Set Data](#)
[Integration Layer Processes and Web Services](#)
[Merchandise Locator API](#)
[Brokered Backorders](#)
[Tracking User, Authority, and Password Updates](#)
[Translating Special Characters](#)

Operating Background Jobs

Topics in this part: The following topics describe the functions available to operate the background ASYNC jobs.

- [Using the ASYNC Jobs \(MBJC\)](#) describes the purpose of the background jobs, provides a brief overview of the each background ASYNC job, explains the steps to use to start and end the background ASYNC jobs, and shows you how to location the function.
- [Working with the CNTL_ASYNC Job](#) shows you how to start and end the background ASYNC jobs, how to reorganize the data queues associated with the background ASYNC jobs, and how to change the status of the background ASYNC jobs.
- [Working with the BILL_ASYNC Job](#) shows you how to display the Billing Header Data Queue, how to correct Billing ASYNC errors, how to change the status of the Billing ASYNC job, and describes the table updates that occur when records are processed by the BILL_ASYNC job.
- [Working with the EBO_ASYNC Job](#) shows you how to display the Evaluate B/O Data Queue, how to correct EBO_ASYNC errors, how to change the status of the EBO_ASYNC

job, and describes the table updates that occur when records are processed by the EBO_ASYNC job.

- [Working with the ORDR_ASYNC Job](#) shows you how to display the Order Ship To Data Queue, how to correct ORDR_ASYNC errors, how to change the status of the ORDR_ASYNC job, and describes the table updates that occur when records are processed by the ORDR_ASYNC job.
- [Working with the OTHR_ASYNC Job](#) shows you how to display the PO Header Data Queue, how to correct OTHR_ASYNC errors, how to change the status of the OTHR_ASYNC job, and describes the table updates that occur when records are processed by the OTHR_ASYNC job.
- [Purging Active Procedures \(MACP\)](#) shows you how to display the Active Procedures for a user and how to delete stranded Active Procedure records for a user.
- [Working with Integration Layer Processes \(IJCT\)](#) shows you how to work with the integration layer processes used for transmitting data between Order Administration and an external system.

Using the ASYNC Jobs (MBJC)

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

ASYNC jobs are used to process these updates for the following reasons:

- System response time would be affected if all table updates associated with each system transaction were processed interactively.
- Table updates can occur more quickly by dynamically updating the tables through out the day rather than running an end of day batch process.
- Analysis information can be viewed and reported more quickly.

Example: When new orders are entered onto the system, the order records are created interactively, and if desired, inventory can be reserved for the order. The order can be maintained, viewed, and is eligible for shipment as soon as it is entered.

The marketing information associated with the order is updated via the Order Processing ASYNC function. These table updates occur throughout the day as the records are sent to the data queue associated with the Order Processing ASYNC function.

ASYNC processing allows you to quickly update the tables necessary to create and ship the order, and eliminates the need to run a batch process at the end of the day to update all of the system tables associated with recording the order.

The following ASYNC jobs are used:

ASYNC Job	Function
CNTL_ASYNC	Starts and ends all of the ASYNC jobs. See Starting the ASYNC Jobs and Ending the ASYNC Jobs .
BILL_ASYNC	Updates system tables as orders are billed.
EBO_ASYNC	Performs reservation for backordered items when inventory levels for an item change.
ORDR_ASYNC	Updates system tables as orders are entered and maintained.

ASYNC Job	Function
OTHR_ASYNC	Updates system tables as purchase orders are entered, maintained, and received.

In this topic:

- [Running the ASYNC \(Background\) Jobs](#)
- [Starting the ASYNC Jobs](#)
- [Processing Transactions](#)
- [Ending the ASYNC Jobs](#)
- [ASYNC Job Status Codes](#)

Running the ASYNC (Background) Jobs

Purpose: The ASYNC jobs, or background jobs, are used to process system table updates throughout the day. These jobs run in the background and process transactions in sequence as they are sent to the data queues. These jobs are placed in a Wait (DEQW) status when there are no records to process.

Starting the ASYNC Jobs

The following ASYNC jobs must be running to process the records in the data queue tables. The controlling ASYNC job (CNTL_ASYNC) is used to start the ASYNC jobs.

- BILL_ASYNC
- EBO_ASYNC
- OTHR_ASYNC

**Note:**

The ORDR_ASYNC job updates system tables with order and demand information as orders are entered and maintained. As you enter or maintain orders, the system sends the records to the Order Processing data queue for processing. As soon as the Order Processing Data queue receives a record to process, the record is processed immediately, regardless of the status of the Order Processing ASYNC (ORDR_ASYNC) job. The ORDR_ASYNC job processes multiple orders simultaneously. While the Order Async job does not need to be active to process records, you should set the Order Async job to active to handle reorganization and cleanup of any transactions that did not process correctly.

If you start the ASYNC jobs and the ASYNC subsystem is not running, the status of the CNTL_ASYNC job will be *JOBQ. The status will change to *ACTIVE as soon as the ASYNC subsystem is up.

Scheduling when the Async Jobs Start: You can create a schedule for a periodic process that contains the STRASYN periodic function to start asyncs.

Function	Description	Program	Summary
STRASYN	Start asyns	MSSTRAS YNC	If the asyns are currently Inactive, this periodic function calls the Controlling Data Queue (CNTL_ASYNC) in Background Job Control (MBJC) and starts the background jobs. This periodic function performs the same updates as selecting Start for the CNTL_ASYNC to start the background jobs. See Starting the Background ASYNC Jobs.

For more information:

- See Working with Periodic Processes (WPPR) for information on how to assign each function to a periodic process.
- See Executing Periodic Processes (EPRO) for more information on scheduling a periodic process to run at a specified time.

Processing Transactions

As transactions are processed on the system, records are sent to the data queues. The records are processed one-by-one in the sequence in which they were sent to the data queue. A separate data queue is used for each ASYNC job. The status of each data queue record can be viewed at any point by displaying the data queue associated with the ASYNC job.

Errors: If an error occurs as a record is being processed, the system stops processing the record at the error point, and moves on to the next record in sequence for processing.

The records in error remain on the system until the error is corrected and processing can be fully completed. The errors are listed on the error reports that print when the ASYNC jobs are ended. A separate error report is printed for each ASYNC job.

Processing errors occur when a table associated with the transaction cannot be updated. This usually occurs because the system is attempting to update a record that no longer exists.

Example: If the Source Code record associated with an order is deleted before the order is billed, an error will occur during BILL_ASYNC.

Status of async jobs: When the Async jobs are active, the system checks the status of each async job under Job Management (My Jobs). If the async job is active and the job status is not RUN, the next time the system checks the status of the async jobs, the system automatically updates the job status to RUN. For example, if the Order Async is Active and you change the ORDR_ASYNC job to END, the system will automatically change the status of the ORDR_ASYNC job back to RUN. To start or stop the Async jobs, you need to start or stop the Controlling Async job in the Background Job Control (MBJC) menu option.

Ending the ASYNC Jobs

The ASYNC jobs must be ended to clear the completed records from the data queue tables and to print the error reports. The controlling ASYNC job (CNTL_ASYNC) is used to end all of the ASYNC jobs. You can use the **ENDASYN** periodic function to end them.

The ASYNC jobs should be ended once per day so that the data queues can be deleted and any errors can be corrected in a timely manner. If you do not bring these jobs down regularly:

- Completed records in the data queues will not be deleted and the data queue tables will become quite large.
- The 'shut down' process will take longer.

- Errors will be more difficult to correct.

For more information: See Troubleshooting the Async Jobs for more information.

Scheduling when the Async Jobs End: You can create a schedule for a periodic process that contains the ENDASYN periodic function to end asyncs.

Function	Description	Program	Summary
ENDASYN	End asyncs	MSENDASYN	If the asyncs are currently Active, this periodic function calls the Controlling Data Queue (CNTL_ASYNC) in Background Job Control (MBJC) and ends the background jobs. This periodic function performs the same updates as selecting End for the controlling data queue to end the background jobs; however, any records in the data queue will be processed when the background ASYNC jobs are restarted. See Ending the Background ASYNC Jobs for more information on the updates that are performed.

For more information:

- See Working with Periodic Processes (WPPR) for information on how to assign each function to a periodic process.
- See Executing Periodic Processes (EPRO) for more information on scheduling a periodic process to run at a specified time.

When the ASYNC jobs are ended:

- If you manually end asyncs, a terminator record is sent to each data queue to identify the last record to be processed. Records sent to the data queue before the terminator record will be processed; records sent to the data queue after the terminator record was sent will be processed when the background ASYNC jobs are restarted.
- If you use the ENDASYN periodic function to end asyncs, any records in the data queue will be processed when the background ASYNC jobs are restarted.
- The data queue will be reorganized. All completed records will be deleted from the data queue tables.
- An error report listing all of the records that could not be processed, and the reason for the error, will be printed. A separate error report will print for each ASYNC job.
- The status of the ASYNC jobs will change to *INACTIVE.

If someone reboots the server: If someone restarts Order Management System while an asynchronous job is active, the system updates the job on the Job Management Screen (under My Jobs) to MSG status. In this situation, you will need to run the JOBCLN periodic function. See Running the JOBCLN Periodic Function to Correct the Async Jobs for more information.

ASYNC Job Status Codes

Status	Description
*ACTIVE	The ASYNC job is up and running.
*INACTIVE	The ASYNC job is not running.

Status	Description
*JOBQ	The ASYNC job has been submitted to the job queue for start-up. The ASYNC jobs are in a *JOBQ status only when the ASYNC subsystem has not been started.
*ENDPEND	The ASYNC job is in the process of ending.
*REORG	Completed records processed by the ASYNC job are being deleted from the tables.

Working With the CNTL_ASYNC Job

The controlling ASYNC job (CNTL_ASYNC) is used to start and end each of the background ASYNC jobs. When you start the CNTL_ASYNC job, all of the background ASYNC jobs start; when you end the CNTL_ASYNC job, all of the background ASYNC jobs end. You cannot start or end an individual background ASYNC job.

You should end the CNTL_ASYNC job each day, when your operations for the day are complete. When you end the CNTL_ASYNC job:

- Records that were processed successfully for each background ASYNC job are deleted from the data queue tables.
- An error list is produced for each background ASYNC job.

Ending the background ASYNC jobs allows you to delete unnecessary records from the system, and enables you to correct any processing errors in a timely manner.

In this topic:

- [Work with Background Jobs Screen](#)
- [Display Asynchronous Job Screen \(Displaying the CNTL_ASYNC Job\)](#)
- [Starting the Background ASYNC Jobs](#)
 - [Starting the Background ASYNC jobs](#)
- [Ending the Background ASYNC Jobs](#)
 - [Display Active Procedure Window](#)
- [Reorganizing the ASYNC Job Data Queues](#)
- [Troubleshooting the Async Jobs](#)
 - [Determining the Status of the Async Jobs](#)
 - [Verifying the Status of the Async Jobs](#)
 - [Running the JOBCLN Periodic Function to Correct the Async Jobs](#)
 - [Reviewing the Async Job Log](#)

Work with Background Jobs Screen

Purpose: This screen displays the current status of each background ASYNC job. This screen is used to start or end the ASYNC jobs, to display the records in the data queue associated with each job, or to reorganize the data queues.

All of the options on this screen can be used with the Controlling ASYNC (CNTL_ASYNC) job.

How to display this screen: Enter MBJC in the *Fast path* field at the top of any menu or select Background Job Control from a menu.

Field	Description
Job name	The name of the ASYNC job. The ASYNC jobs are: - BILL_ASYNC = Billing background job - CNTL_ASYNC = Controlling background job - EBO_ASYNC = Evaluate backorders background job - ORDR_ASYNC = Order processing background job - OTHR_ASYNC = Other background job purchase orders) <i>Alphanumeric, 10 positions; optional.</i>
Description	The description of the data queue associated with the ASYNC function. <i>Alphanumeric, 40 positions; optional.</i>
Status	The status of the ASYNC job. Valid status codes are: *ACTIVE = the ASYNC function is running *INACTIVE = the ASYNC function has ended *JOBQ = the ASYNC function has been submitted to the job queue for startup *Endpend = the ASYNC function is in the process of ending *Reorg = the data queue associated with the ASYNC function is being reorganized <i>Alphanumeric, 10 positions; display-only.</i>
Control	A code indicating whether the ASYNC function is a controlling function. The controlling function is used to start, end, and reorganize the data queues for the ASYNC functions it controls. Currently, the CNTL_ASYNC function is the only controlling function. Valid codes are: - Y = the ASYNC function is a controlling function - N = the ASYNC function is not a controlling function.

**Note:**

In order to perform certain options at the Work with Background Jobs screen, you need to have the *Security administrator* flag for the user selected. See [User Configuration](#) in the Administration Guide for more information.

Screen Option	Procedure
Display the attributes of an ASYNC job	Select Display for an ASYNC job to advance to the Display Asynchronous Job Screen (Displaying the CNTL_ASYNC Job) .
Start the background ASYNC jobs	Select Start for the CNTL_ASYNC job to start all of the ASYNC jobs. See Starting the Background ASYNC Jobs .
End the background ASYNC jobs	Select End for the CNTL_ASYNC job to end all of the ASYNC jobs. See Ending the Background ASYNC Jobs .
Reorganize the data queue for a background ASYNC job	Select Reorganize queue for the CNTL_ASYNC job to reorganize the data queues associated with each ASYNC job. See Reorganizing the ASYNC Job Data Queues .
Display the data queue for an ASYNC job	Select Display Data queue for an ASYNC job. Display Data queue cannot be used with the CNTL_ASYNC.

Screen Option	Procedure
Work with Drop Ship background jobs	Select Drop Ship Jobs to advance to the Work with Drop Ship Background Jobs Screen .
Work with integration layer jobs	Select Integration Layer to advance to the Work with Integration Layer Process Screen .

Display Asynchronous Job Screen (Displaying the CNTL_ASYNC Job)

Purpose: Use this screen to display descriptive information about an ASYNC job such as the CNTL_ASYNC job.

How to display this screen: Select Display for a job at the [Work with Background Jobs Screen](#).

Field	Description
Process name	The name of the process for this ASYNC job. Listed as the Workstation for the ASYNC job at the screen in Purge Active Procedures Across Users (MACX). The data queues are: • CNTL_ASYNC = CNTRLDATAQ • BILL_ASYNC = BILLDATAQ • EBO_ASYNC = EVLBODATAQ • ORDR_ASYNC = ORDERDATAQ • OTHR_ASYNC = OTHERDATAQ Alphanumeric, 10 positions; display-only.
Job name	The name of the ASYNC job. The ASYNC jobs are: • BILL_ASYNC = Billing background job • CNTL_ASYNC = Controlling background job • EBO_ASYNC = Evaluate backorders background job • ORDR_ASYNC = Order processing background job • OTHR_ASYNC = Other background job purchase orders) Each ASYNC job is discussed separately in this part. Alphanumeric, 10 positions; optional.
Description	The description of the ASYNC job. Alphanumeric, 40 positions; display-only
Start	The date and time the ASYNC job was last started and the User ID of the person who started it. (Date): Numeric, 6 positions; display-only. (Time): Numeric, 6 positions; display-only. (User ID): Alphanumeric, 10 positions; display-only.
End	The date and time the ASYNC job was last ended and the User ID of the person who ended it. (Date): Numeric, 6 positions; display-only. (Time): Numeric, 6 positions; display-only. (User ID): Alphanumeric, 10 positions; display-only.

Field	Description
Controlling job	A flag indicating whether this function controls other ASYNC functions. The controlling ASYNC function starts and ends other ASYNC functions. Valid values are: • Selected = This is a controlling ASYNC function. • Unselected = This is not a controlling ASYNC function. The CNTL_ASYNC job is the only controlling ASYNC job.
System Option	A flag indicating whether this function is a system function that cannot be deleted by the user. Valid values are: • Selected = This function cannot be deleted by the user. • Unselected = This function can be deleted by the user.
Status	The current status of the function. Valid status codes are: • *ACTIVE • *INACTIVE • *ENDPEND • *JOBQ • *REORG Display-only.

Starting the Background ASYNC Jobs

Purpose: The CNTL_ASYNC job is used to start and end all of the other background ASYNC jobs.

The following background jobs must be active for the records in the data queues to be processed. If the background ASYNC job is not active, records will be held in the data queue until you start the background ASYNC jobs.

- BILL_ASYNC
- EBO_ASYNC
- OTHR_ASYNC



Note:

The ORDR_ASYNC job updates system tables with order and demand information as orders are entered and maintained. As you enter or maintain orders, the system sends the records to the Order Processing data queue for processing. As soon as the Order Processing Data queue receives a record to process, the record is processed immediately, regardless of the status of the Order Processing ASYNC (ORDR_ASYNC) job. The ORDR_ASYNC job processes multiple orders simultaneously. While the Order Async job does not need to be active to process records, you should set the Order Async job to active to handle reorganization and cleanup of any transactions that did not process correctly.

Starting the Background ASYNC jobs

You can start the background ASYNC jobs manually at the [Work with Background Jobs Screen](#), or create a periodic process to schedule the ASYNC jobs to start at a specified time. When you start the background ASYNC jobs, the system removes any terminator records that may exist in the data queues. The system creates a terminator record in the data queues when

you end the background async jobs to determine which records to process before the asyncs are brought down and which records to process when the asyncs are restarted. Multiple terminator records may exist in the data queues if you run the ENDASYN periodic function to end the asyncs when the asyncs are already inactive. Because you are now starting the background async jobs, the system no longer needs the terminator records to determine when to reprocess the records in the data queue and instead will process all records that may exist in the data queues.

Before you start the background ASYNC jobs: To start the background ASYNC jobs, the status of each job must be *INACTIVE and each job must not be running. You can use the [Display Active Batch Jobs Screen](#) menu option to verify that the jobs are not running.

To manually start the ASYNC jobs:

1. At the [Work with Background Jobs Screen](#), review the status of the background jobs. The jobs must be started if the status is *INACTIVE.
2. Select Start for the CNTL_ASYNC job.
3. The status of the ASYNC jobs should be *ACTIVE.

Unable to start? The system verifies that the job is not currently in active status and is not actually running on any server. If the job is already in active status, or is actually running on a server, the screen displays an error message.

To resolve issues with the job's status, use the [JOBCLN](#) periodic function.

To schedule the ASYNC jobs to start at a specified time:

Create a schedule for a periodic process that contains the STRASYN periodic function to start asyncs.

Function	Description	Program	Summary
STRASYN	Start asyncs	MSSTRASYNC	If the asyncs are currently Inactive, this periodic function calls the Controlling Data Queue (CNTL_ASYNC) in Background Job Control (MBJC) and starts the background jobs. This periodic function performs the same updates as selecting Start for the CNTL_ASYNC to start the background jobs.

For more information:

- See [Working with Periodic Processes \(WPPR\)](#) for information on how to assign each function to a periodic process.
- See [Executing Periodic Processes \(EPRO\)](#) for more information on scheduling a periodic process to run at a specified time.
- See [Using the JOBCLN Function to Resolve Job Status Across Servers](#) for more information on how to reset the async jobs when they are out of sync.

Ending the Background ASYNC Jobs

Purpose: You can end the background ASYNC jobs manually at the [Work with Background Jobs Screen](#), or create a periodic process to schedule the ASYNC jobs to end at a specified time.

Use the CNTL_ASYNC job to end all of the other background ASYNC jobs. You should bring down the background jobs at the end of your processing day.

When you bring down the background ASYNC jobs:

- If you manually end asyncs, a terminator record is sent to each data queue to identify the last record to be processed. Records sent to the data queue before the terminator record will be processed; records sent to the data queue after the terminator record was sent will be processed when the background ASYNC jobs are restarted.
- If you use the ENDASYN periodic function to end asyncs, any records in the data queue will be processed when the background ASYNC jobs are restarted.
- The data queues are reorganized. All completed records are deleted from the data queue tables. Records that have not been fully processed will be reloaded to the data queue when the background ASYNC jobs are restarted.
- An error list prints for each background ASYNC job, listing the records that could not be fully processed and the reason for the error.

When the jobs end: The status of each background job will change from *ACTIVE to *INACTIVE. (You may see *ENDPEND or *REORG before you see *INACTIVE, depending upon how long it takes to end each job.)



Note:

You must end the background ASYNC jobs before the ASYNC subsystem is brought down. If you bring down the ASYNC subsystem while the background ASYNC jobs are running, the jobs will be ended but will remain in an *ACTIVE status. You will then need to run the JOBCLN periodic function to reset the status correctly. See [Using the JOBCLN Function to Resolve Job Status Across Servers](#).

To manually end the ASYNC jobs:

1. Select End for the CNTL_ASYNC job at the [Work with Background Jobs Screen](#).
2. The status of the ASYNC jobs changes to ENDING and then to INACTIVE.
3. When you end the ASYNC jobs, the Display Active Procedure window displays if there are any active procedures for the Order Entry/Maintenance, Purchase Order Maintenance, Receiving, or Confirmation functions. The system creates these records to prevent possible conflicts when users are engaged in these activities. See [Display Active Procedure Window](#).

Unable to end? The system verifies that the job is not currently in inactive status and is actually running server. If the job is already in inactive status, or is not actually running on a server, the screen displays an error message.

To resolve issues with the job's status, use the [JOBCLN](#) periodic function.

Display Active Procedure Window

This window opens when you end the ASYNC jobs if there are any active procedures for the Order Entry/Maintenance, Purchase Order Maintenance, Receiving, or Confirmation functions. The system creates these records to prevent possible conflicts when users are engaged in these activities.

If a user is active in a function:

- the user can exit the function before the ASYNC jobs end. Depending on the activity, the user might need to exit Order Administration and then reenter, if needed, to clear the active procedure record.

- you can select Delete next to each active procedure record to delete the active procedure, or select Delete all to delete them all. Deleting the active procedure does not force the user out of the activity; there is no signal of the deletion to the user and the user can continue entering updates to the record. However, this allows more than one user to access the same record, such as an order or a customer and possibly overwrite each other's updates.

If neither of these steps clears the active procedure record, you will need to purge the Active Procedures table. See [Purging Active Procedures \(MACP\)](#).

Field	Description
Job #	The system job number assigned to the active procedure. Numeric, 6 positions; display-only
Program description	The description of the program associated with the Active Procedures record. Alphanumeric, 3 positions; display-only.
User	The User ID of the person engaged in the activity that created the Active Procedures record. Alphanumeric, 10 positions; display-only.
Workstation	The Workstation ID where the user is working. Alphanumeric, 10 positions, display-only.
Start date	The date when the Active Procedures record was created. This is the date the user entered the application. Numeric, 6 positions; display-only.
Time	The time when the Active Procedure record was created. This is the time the user entered the application. Numeric, 6 positions; display-only.

To remove active procedures:

1. Have each person whose name appears in the window exit the application so that you can end the ASYNC jobs. It may be necessary to exit Order Administration temporarily to delete the active procedure record, or
2. Select Delete next to each active procedure record to delete the active procedure. Deleting the active procedure does not force the user out of the activity; there is no signal of the deletion to the user and the user can continue entering updates to the record. However, this allows more than one user to access the same record, such as an order or a customer and possibly overwrite each other's updates.
3. Use Purging Active Procedures (MACP) to delete any stranded Active Procedure records, if necessary. You can also purge active procedures for interactive jobs that are older than a specified number of hours using the Delete Stranded Active Procedures (PFR0121) periodic function.
4. Select Refresh to refresh the Active Procedure Window to monitor whether the users have exited.
5. Select Exit to exit the window and return to the [Work with Background Jobs Screen](#).

Deleting active procedure records: You can delete the Active Procedure records at this window by selecting Delete for each record in the window. Deleting the active procedure does not force the user out of the activity, such as order entry; there is no signal of the deletion to the user and the user can continue entering updates to the record. However, it is not recommended to delete Active Procedure records in this way, because it removes the safeguard against two users potentially accessing the same record, such as an order or customer, at the same time.

To schedule the ASYNC jobs to end at a specified time:

Create a schedule for a periodic process that contains the ENDASYN periodic function to end asyns.

Function	Description	Program	Summary
ENDASYN	End asyns	MSENDASYN	If the asyns are currently Active, this periodic function calls the Controlling Data Queue (CNTL_ASYNC) in Background Job Control (MBJC) and ends the background jobs. This periodic function performs the same updates as selecting End for the controlling data queue to end the background jobs; however, any records in the data queue will be processed when the background ASYNC jobs are restarted.

 Note:

When you end the ASYNC jobs using the job scheduler, the system does not look for active procedures, and instead, ends the asyns immediately.

For more information:

- See Working with Periodic Processes (WPPR) for information on how to assign each function to a periodic process.
- See Executing Periodic Processes (EPRO) for more information on scheduling a periodic process to run at a specified time.

Reorganizing the ASYNC Job Data Queues

Purpose: The data queues associated with the ASYNC jobs are reorganized when the ASYNC jobs are ended. Use the Reorganize queue option as a recovery tool only when the ASYNC jobs end abnormally before the data queues have been reorganized. This option allows you to reorganize the data queues before the next ASYNC job end is processed.

To determine if the data queues were reorganized: Display the data queue for an ASYNC job. If the entry date for a record is earlier than the date you last ended the ASYNC jobs, or if records are in a *BLANK status, the data queues were not reorganized. If you do not use the Reorganize queue option, the data queues will be reorganized the next time you end the ASYNC jobs.

When you use the Reorganize queue option, the system deletes completed records from the data queue tables associated with the ASYNC jobs. Records that have not been fully processed will be reloaded to the data queues when the background ASYNC jobs are restarted.

The Reorganize queue option is available only with the CNTL_ASYNC job. All of the ASYNC jobs must be in a *INACTIVE status, and there can be no Active Procedures records for Order Entry, Order Maintenance, Purchase Order Maintenance, Receiving, and Confirmation functions.

Before you reorganize the data queues: Before you attempt to reorganize the data queues, you should make sure that the status of each ASYNC job is *INACTIVE.

How to reorganize the data queues: Select Reorganize queue for the CNTL_ASYNC job at the [Work with Background Jobs Screen](#).

Active procedures window: A pop-up window opens if there are any users in the Order Entry/Maintenance, Purchase Order Maintenance, Receiving, or Confirmation functions. The data queues cannot be reorganized if there are any users in these functions. See [Ending the Background ASYNC Jobs](#)

For more information: See [Troubleshooting the Async Jobs](#) for more information on the steps you should take if you suspect the async jobs are not running correctly.

Troubleshooting the Async Jobs

Use the following steps if you suspect that the async jobs are not running correctly.

- [Determining the Status of the Async Jobs](#)
- [Verifying the Status of the Async Jobs](#)
- [Running the JOBCLN Periodic Function to Correct the Async Jobs](#)
- [Reviewing the Async Job Log](#)

Determining the Status of the Async Jobs

Use the [Display Active Batch Jobs Screen](#) to determine if the async jobs are running across all Order Administration application servers.

- If the async job is listed on the [Display Active Batch Jobs Screen](#), the job is running. Review the My Jobs field for the async job to determine if the status of the async job on the [Job Management Screen](#) is accurate. See [Verifying the Status of the Async Jobs](#).
- If the async job is not listed on the Display Active Batch Jobs screen, the job is not running, regardless of the status of the job on the [Job Management Screen](#) or the status of each async job on the [Work with Background Jobs Screen](#). See [Running the JOBCLN Periodic Function to Correct the Async Jobs](#) for background on resetting the asyncs. Once the JOBCLN completes, you can restart the background async jobs; see [Starting the Background ASYNC Jobs](#).

Verifying the Status of the Async Jobs

The batch jobs displayed on the Display Active Batch Jobs Screen are the jobs that are currently running across all Order Administration application servers. The My Jobs field on this screen indicates if the status of the batch job on the [Job Management Screen](#) is accurate. The table below indicates the action to take, based on the status of the async job on the Display Active Batch Jobs screen.

Async Status in My Jobs Field:	Indicates:	Action to Take:
RUN	The async job is running and the status of the job on the Job Management Screen is accurate.	Verify that the status of each of the async jobs that is running displays as *ACTIVE on the Work with Background Jobs Screen. What if the async job is active but no records are being processed? If this situation occurs, it is possible that the controlling async data queue table has been cleared. To correct, use the JOBCLN periodic function.

Async Status in My Jobs Field:	Indicates:	Action to Take:
MSG	The async job is running, but the status on the Job Management Screen is not accurate.	When the Async jobs in the Background Job Control (MBC) menu option are active, the system checks the status of each async job on the Job Management screen. If the async job is active and the job status is not RUN, the next time the system checks the status of the async jobs, the system automatically updates the job status to RUN.
ERR	The async job is running, but a user has manually ended the job on the Job Management Screen while its status was MSG.	1. If an async job is listed on the Display Active Batch Jobs Screen and its My Jobs status is not RUN, wait a few minutes to see if the system will automatically update the status to RUN. 2. Once the status updates to RUN, verify that the status of the async jobs displays as *ACTIVE on the Work with Background Jobs Screen .
END	The async job is running, but a user has manually ended the job on the Job Management Screen.	If the async job does not auto-update to a RUN status, you will need to determine if an error occurred. See Reviewing the Async Job Log . Use the JOBCLN periodic function to correct the async jobs. See Running the JOBCLN Periodic Function to Correct the Async Jobs for more information.
RMV	The async job is running, but a user has removed the job from the Job Management Screen.	Note: Never try to end an actively running async job by manually ending it on the Job Management Screen. This does not actually end the async job. End the CNTL_ASYNC that submitted the job. See Ending the Background ASYNC Jobs for instructions. Once you end the CNTL_ASYNC, the system ends the async job and removes the async job from the Display Active Batch Jobs Screen since it is no longer running. You will need to restart the CNTL_ASYNC in order to resubmit the job and run it again. Note: Never remove an actively running async job from the Job Management Screen. If you do this, the system removes all traces of the job from the system, even though the job is still actively running.

Running the JOBCLN Periodic Function to Correct the Async Jobs

Running the JOBCLN Periodic Function to Correct the Async Jobs

The JOBCLN periodic function corrects the status of ASYNC jobs across all servers as follows.

Correcting the status of the BILL_ASYNC, EBO_ASYNC, OTHR_ASYNC, and ORDR_ASYNC:

- Currently running? If one of these ASYNC jobs is currently running, the JOBCLN function does the following:
 - If the status is INACTIVE, change the status to ACTIVE; otherwise, do not change the status. Also, for the BILL_ASYNC job, make sure that there is an active procedure if the job is running.
 - If there are multiple Ending records for an async job, delete all but one.

- If the job is in END, FIN, or MSG at Job Management (My Jobs) screen, change the status to RUN and update Job History (Display Job History (DJHY)).
- Not currently running? Otherwise, if the ASYNC job is not currently running, the JOBCLN function does the following:
 - If the status is ACTIVE, change it to INACTIVE.
 - If there is an active procedure for the BILL_ASYNC job, delete it.
 - If the job is in RUN or MSG status, or any status except END at the Job Management screen, change the status to END and update Job History.

Correcting the status of the CNTL_ASYNC job:

- Currently running? If the job is running, the JOBCLN periodic function does the following:
 - If the status is INACTIVE, update it to ACTIVE; otherwise, do not change status.
 - If the status is not in ENDING or REORG status, delete any Ending records for each of the ASYNC jobs.
 - If the status is END, FIN, or MSG at the Job Management screen, update the status to RUN and update Job History.
 - If the EBO_ASYNC or ORDR_ASYNC jobs are INACTIVE, start them.
 - If the BILL_ASYNC or OTHR_ASYNC are INACTIVE, do not change the status because each will start up automatically when data arrives in its queue.
- Not currently running? If the CNTL_ASYNC is not currently running, the JOBCLN periodic function does the following:
 - If any other ASYNC job is ACTIVE, create an Ending record if one does not exist.
 - If any of the other ASYNC jobs are INACTIVE, delete any Ending records for those jobs.
 - If the CNTL_ASYNC status is ACTIVE or ENDING or JOBQ, change to INACTIVE.
 - If the status is REORG and the REORG Job is not currently running, change the status to INACTIVE.
 - If the status is RUN, FIN, MSG, or any other status at the Job Management screen, update the status to END and update Job History.

Reviewing the Async Job Log

If the async job remains in a MSG status without being auto-corrected by the system, you can also review the async job log to determine if an error occurred.

Async Job Log

To review the async job log: Click the logFile link for the async job on the Job Management Screen to advance to the Log file screen. Note: If the logFile is not a link, the async job was submitted from a different application server; you must log on to the other application server to review the async job log.

If an error occurred during async processing, the system writes an entry similar to the following in the async job log:

```
2009-04-18 22:09:10,161 ERROR [ JENASYS] execute(): status change to
[MSG]:334547java.lang.RuntimeException: java.lang.RuntimeException:
com.microsoft.sqlserver.jdbc.SQLServerException: The result set has no
current row. (JenasysJob.java:297)
```

```
2009-04-18 22:09:10,177 ERROR [ JENASYS] run(): Job status change to
[MSG]. In 'invokeHandler' EXCEPTION occurred while calling
```

```
processServiceRequest. java.lang.RuntimeException:  
com.microsoft.sqlserver.jdbc.SQLServerException: The result set has no  
current row. (JenasysJob.java:701)
```

If an error exists in the async job log, copy the error and the log so that the problem can be researched if needed.

If an error occurred for one async job: Use the JOBCLN periodic function. See [Using the JOBCLN Function to Resolve Job Status Across Servers](#) for more information.

Working With the BILL_ASYNC Jobs

Purpose: The BILLING ASYNC job updates system tables with sales and shipment information as orders are billed.

As orders are confirmed, items returned, or records are uploaded from the PC Manifest system, the system sends records to the Billing data queue for processing. If the Billing ASYNC (BILL_ASYNC) job is active, it processes the records immediately. If the job is inactive when the records arrive, the BILL_ASYNC job processes them when it becomes active again. Records for virtual stored value cards are given priority for processing, and all other records are processed afterward in the sequence in which they arrive at the data queue.

If there are any errors, processing for that order stops at the error point. The system begins processing for the next order record in sequence. You should correct any errors that exist as soon as possible so that your system tables update properly. See [Working with BILL_ASYNC Status Messages](#).

You can review the status of each record in the data queue at any point at the [Display Billing Header Data Queue Screen](#)

To generate a shipment or return confirmation: Order Administration generates a shipment or return confirmation email or *Outbound Email XML Message (CWEmailOut)* when you:

- process a shipment or return through billing if the [Send Shipment Confirmation from Billing \(L98\)](#) system control value is selected.
- generate shipment confirmations or return confirmations using the Send Internet Order Ship Confirmations menu option; see [Sending Internet Order Ship Confirmation \(ESCF\)](#).
- execute the ECSHCNF periodic function; see [Working with Periodic Functions \(WPER\)](#).

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

For more information: See [Troubleshooting the Async Jobs](#) for more information on the steps you should take if you suspect the async jobs are not running correctly.

In this topic:

- [Related System Control Values](#)
- [Display Asynchronous Job Screen \(Displaying the Billing ASYNC Job\)](#)
- [Display Billing Header Data Queue Screen](#)
- [Working with BILL_ASYNC Status Messages](#)
- [Updates During Background Processing](#).

Related System Control Values

The following system control values affect the function of the BILL_ASYNC job.

System Control Value	Description
Use Async Start Date for Billing Transactions (E95)	If this system control value is selected, the Override Async Start Date pop-up window opens when you start the CNTL_ASYNC job. In this window you can specify a date other than the system date to update billing transaction records and ensure a clean cutoff for billing. You must confirm your entry after completing the pop-up window. See Working with the CNTL_ASYNC Job. If this system control value is unselected, the system date is used for all billing transactions. Because Order Administration can be set up with multiple companies each with different settings, if any company has the system control value selected, the pop-up window is displayed. The override date that you enter at the window is used only for those companies that have the system control value selected; the system date is used for any company where the system control value is unselected.
Number of Billing Async Jobs to Start (F08)	This system control value indicates how many instances of the BILL_ASYNC job to run when you start the CNTL_ASYNC job. You can choose to run more than one BILL_ASYNC job to increase the rate at which you process billing transactions. Because the background jobs run for all companies in Order Administration, the system checks the setting for this system control value in all companies, and uses the highest value (up to 9). A setting of 0 or 1 will cause the system to run one BILL_ASYNC job only. See Note: For better system performance, if you run more than one Billing Async job, you should also select Delay Billing Updates (K85) to defer updates. Unique job names: If the <i>Number of Billing Async Jobs to Start (F08)</i> is set to more than 1 and <i>Delay Billing Updates (K85)</i> is selected, each submitted BILL_ASYNC job is assigned a unique name. The first is always named BILL_ASYNC, the second is named BILL_ASYNC_02, and so on.
Delay Billing Updates (K85)	If this system control value is selected, the Billing Async defers certain updates until you run the Delay Billing Update Process. If this system control value is unselected, the Billing Async completes all updates immediately. See Updates During Background Processing for more information on the billing updates that occur immediately and the updates that are processed by the Delay Billing Update Process.

System Control Value	Description
Hold Invoices for Multi-Recipient Orders (G07)	This system control value defines whether the system holds invoices for multi-recipient orders until all of the pick slips for the order are confirmed. If this system control value is selected, the system determines if the pick slip being confirmed is the last pick slip that needs to be confirmed for the multi-recipient order. If the pick slip is the last pick slip that needs to be confirmed for the order, the system: • submits all of the pick slips associated with the order to the BILL_ASYNC • places the order in a closed status • creates an invoice for all of the pick slips associated with order If the pick slip is not the last pick slip that needs to be confirmed for the order, the system: • places the pick slip in a B (billing pending) status until all of the pick slips for the order have been confirmed • does not create an invoice • keeps the order in an open status • writes an order transaction history message indicating that the pick slip has been confirmed
Capture Addresses for Invoice (J24)	If this system control value is selected, the system saves the billing and shipping addresses for each invoice during billing. The shipping address is used to calculate tax.
Preload Deposits (L78)	If selected, billing creates records in the CC Deposit Transaction table and CC Deposit History table immediately after creating records in the Invoice Payment Method table.

Display Asynchronous Job Screen (Displaying the Billing ASYNC Job)

Purpose: Use this screen to display the job attributes for each background ASYNC job, including the Billing ASYNC job.

How to display this screen: Select Display for the BILL_ASYNC job at the [Work with Background Jobs Screen](#).

Field	Description
Process name	The name of the process for this ASYNC job. The name of the billing data queue is BILLDATAQ. Alphanumeric, 10 positions; display-only.
Job name	The name of the ASYNC job. Alphanumeric, 10 positions; display-only.
Description	The description of the ASYNC job. Alphanumeric, 40 positions; display-only.

Field	Description
Start	The date and time the ASYNC job was last started and the User ID of the person who started it. (Date): Numeric, 6 positions; display-only. (Time): Numeric, 6 positions; display-only. (User ID): Alphanumeric, 10 positions; display-only.
End	The date and time the ASYNC job was last ended and the User ID of the person who ended it. (Date): Numeric, 6 positions; display-only. (Time): Numeric, 6 positions; display-only. (User ID): Alphanumeric; 10 positions; display-only.
Controlling job?	A flag indicating whether this job controls other ASYNC functions. The controlling ASYNC job starts and ends other ASYNC functions. Valid values are: - Selected = This is a controlling ASYNC job. - Unselected = This is not a controlling ASYNC job. The CNTL_ASYNC job is the only controlling ASYNC job.
System Option?	A flag indicating whether this job is a system function that cannot be deleted by the user. Valid values are: - Selected = This job cannot be deleted by the user. - Unselected = This job can be deleted by the user.
Status	The current status of the job. Valid status codes are: *ACTIVE *INACTIVE *ENDPEND *JOBQ *REORG Display-only.

Display Billing Header Data Queue Screen

Purpose: This screen displays the records that were sent to the data queue for processing since the last time the ASYNC job was ended. Records are sent to the data queue when orders are confirmed or items are returned.

Records for virtual stored value cards are given priority for processing, and all other records are processed afterward in the sequence in which they arrive at the data queue.

The status of each record, indicating if the record was processed or if any errors exist, displays.

How to display this screen: Select Display Data Queue for the BILL_ASYNC job at the [Work with Background Jobs Screen](#).

Field	Description
Cmp (Company)	The number of the company for which the transaction was processed. If you are running operations for more than one company, transactions for all companies are submitted to the same data queue. Numeric, 3 positions; display-only.

Field	Description
Date	The date when the transaction was submitted to the data queue for processing. Numeric, 6 positions (in user date format); display-only.
Time	The time when the transaction was submitted to the data queue for processing. Note: The number of seconds might exceed 59 if the ASYNC job processed 60 or more records in a minute. Numeric, 6 position (HH:MM:SS format); display-only.
Job #	The job number assigned to the transaction when it was submitted to the data queue. Numeric, 6 positions; display-only.
B/A	A code indicating whether the record represents a before image or an after image for the transaction. After records are written for all transactions; before records are written for orders that have been maintained. Valid codes are: • B = The record represents the order information before the transaction was processed. • A = The record represents the order information after the transaction was processed. Alphanumeric, 1 position; display-only.
Processed	The status of the record. The record is either not processed, in process, in error, or processed. A status message displays for each step. Alphanumeric, 30 positions; display-only.
Ordr ship to	The order ship-to number for which the record is being processed. (Order #): Numeric, 8 positions; display-only. (Ship-to): Numeric, 3 positions; display-only.
Trans	A code identifying the function from which the transaction originated. Valid status codes are: • CF = Confirmation • DS = Drop Ship • EB = Evaluate Backorders • OE = Order Entry • OM = Order Maintenance • PM = Purchase Order Maintenance • PR = Receiving • RA = Return Authorization • US = Unspecified Alphanumeric, 2 positions, display-only.

Working with BILL_ASYNC Status Messages

Purpose: You can review the status of each data queue record by displaying the data queue. You must correct the error before the billing transaction can be fully processed.

BILL_ASYNC status messages: This table lists the status messages that you may see when displaying the Billing Header Data Queue

Message	Message ID	Error Reason/Action Required
Processing has begun	-----	None.

Message	Message ID	Error Reason/Action Required
All updates complete	----	None. The record was fully processed.
Cust Bill To Change	OA20931	A Bill To record does not exist for the customer in the Customer Bill To table. This error cannot be corrected by the user.
Cust Ship To Change	OA20937	A Ship To record does not exist for the customer in the Customer Ship To table. This error cannot be corrected by the user.
Cust Sold To Change	OA20939	A Sold To record does not exist for the customer in the Customer Sold To table. This error cannot be corrected by the user.
Division Change	OA22980	A Division record does not exist for the division under which the order was entered, and must be created. See Working with Divisions (WDIV) .
OHD in Use	OA21782	The order is currently being maintained (the Order Header record is in use). The system will process the record when the Order Header record is no longer in use.
OHD# Error	OA21153	The Order Header record does not exist. This error cannot be corrected by the user.
OST# Error	OA21170	The Order Ship To record does not exist. This error cannot be corrected by the user.
PCH in Use	OA22373	The Pick Control record is in use. The system will process the record when the Pick Control record is no longer in use.
Salesman Change	OA21795	A Salesman record does not exist for the sales representative assigned to the order, and must be created. See Working with Sales Representatives (WSLS) .
Ship Via Change	OA21696	A Ship Via record does not exist for the carrier being used to ship the order, and must be created. See Working with Ship Via Codes (WVIA) .
Source Change	OA21695	A Division record does not exist for the division under which the order was entered, and must be created. See Working with Source Codes (WSRC) .

Updates During Background Processing

Purpose: The following tables list the field and table updates during the BILL_ASYNC procedure.

- [Immediate Billing Updates](#)
- [Batch Billing Updates](#)

Immediate Billing Updates

The following billing updates occur immediately during the BILL_ASYNC procedure.

Table	Updates
CC Deposit Transaction	Creates records if the Preload Deposits (L78) system control value is selected

Table	Updates
CC Deposit History	Creates records if the Preload Deposits (L78) system control value is selected
IL Outbound Trigger (MSILOU)	Creates a record with a File/Key type of CAS for each shipment on an order whose order type matches the ChannelAdvisor Order Type (L90) . See ChannelAdvisor Integration Overview , especially Sending Shipment Confirmations to ChannelAdvisor .
Invoice Address (OEINAD)	Creates a record for the shipping and billing address for each invoice if the Capture Addresses for Invoice (J24) system control value was selected
Invoice Currency (MSINCU)	Creates/updates records if the Multi Currency by Offer (E03) system control value or Track Invoice Currency (D68) system control value is selected
Invoice Detail (OEINDT)	Creates/updates records Note: The system bypasses the creation of an Invoice Detail record for a drop ship line when the order line status is X Closed OR the quantity shipped is equal to or greater than the quantity ordered. If this situation occurs, the system writes a message similar to the following in the Application Log : Drop ship line skipped/already billed: 555/00039520/001/00001.
Invoice Detail Charge (INIDCP)	Creates/updates records
Invoice Detail Pay Method (CSINVP)	Creates/updates records
Invoice Header (OEINHHD)	Creates/updates records
Invoice Pay Method (CSINVP)	Creates/updates records
Invoice Ship To (OEINSH)	Creates/updates records
Item Location (INILOC)	Reduce quantity on-hand Reduce printed quantity
Item Transaction History	Creates/updates records
Item Warehouse (INIWRE)	Units sold, \$ Sold Units returned, \$ returned Reduce quantity on-hand
Item Warehouse History (INIWRH)	Units sold, \$ sold Units returned, \$ returned
Order Orchestration	Updates the Status to Complete. Note: The system also sends a status update with a status of Fulfilled for a delivery order, or In transit for a ship-for-pickup order. See Order Orchestration Integration for an overview.
Order Detail (OEORDT)	Updates status Adjusts quantities
Order Line History	Creates/updates records
Order Payment Method (OEPAYM)	Updates amounts billed and credit For a retail pickup or delivery order from the Order Orchestration, deactivates the payment method

Table	Updates
Order Ship To (OEORST)	Updates order balance amounts
Order Shipment Details	Creates a record for a shipment if a tracking number is specified, and generates the order request message to Narvar if the Narvar Integration is enabled
Refunds (CSRFND)	Creates/updates records
Reserved Order Line (FLRSOL)	Updates/deletes records
Stored Value Card (OESVCD)	Create a record for each unit of a stored value card item billed on the order; see Billing a Stored Value Card
Tickler (MSTKLR)	Creates/updates records if the Use Workflow Management (H96) system control value is selected and billing activates a tickler rule

Batch Billing Updates

If the Delay Billing Updates (K85) system control value is selected, the system delays the following billing updates until you run the Delay Billing Update Process; otherwise, these updates also occur immediately.

Table	Updates
Carton Contents	Create carton contents records
Customer Bill To (CSCBIL)	# of invoices # of sales Sales LTD Sales YTD \$ on order # of Credits
Customer Membership (OECSMP)	Create or deactivate customer loyalty memberships based on total sales dollars or customer class. See Loyalty Memberships for an overview.
Customer Ship To Entity (OECHEP)	Units and \$ Sales LTD Units and \$ Exchanges LTD Units and \$ Returns LTD On Order \$
Customer Ship To Item Class Entity (OEICEP)	Units and \$ Sales LTD Units and \$ Exchanges LTD Units and \$ Returns LTD
Customer Ship To Order History (CSORH)	# Sales LTD, \$ Sales LTD # Exchanges LTD, \$ Exchanges LTD # Returns LTD, \$ Returns LTD On Order \$
Customer Shipment History (FLCSHP)	# of shipments, \$ value Last shipment date

Table	Updates
Customer Sold To Entity (OECSEP) 1	Units and \$ Sales LTD Units and \$ Exchanges LTD Units and \$ Returns LTD On Order \$
Customer Sold To Item Class (OECSIC)	Units and \$ Sales LTD Units and \$ Returns LTD Units and \$ Exchanges LTD
Customer Sold To Order History (CSTOOH)	# Sales LTD, \$ Sales LTD, incremented for each recipient # Exchanges LTD, \$ Exchanges LTD # Returns LTD, \$ Returns LTD On Order \$ \$ Warranty Shipped \$ Warranty Returned
Division (MSDIV)	# Sales Today, # Sales LTD, incremented for each recipient \$ Sales Today, \$ Sales LTD # Returns Today, # Returns LTD \$ Returns Today, \$ Returns LTD
Division History (ACDIVH)	# Sales, \$ Sales # Returns, \$ Returns
Exchange Reason/Offer (CSXROF)	# Exchange, \$ Exchange
Exchange Reason/Offer/Item (INEROI)	# Exchange, \$ Exchange
Flexible Payment Option (FLFPOP)	# of shipments, \$ shipped # of returns, and \$ returned
Order Control Summary (MSORSU)	# orders shipped, \$ orders shipped, quantity shipped # invoices credited, \$ invoices credited, quantity credited # orders exchanged, \$ orders exchanged, quantity exchanged Note: The Order Async updates the orders entered, orders canceled, and orders soldout fields in the Order Control Summary table. The batch order control job updates the operation and merchandising fields in the Order Control Summary table; see Reviewing Operations Control Summary (FLSH) .
Order/Billing History (OEBHST)	Qty Sold, \$ Sold Total, # Sales Qty Exchanged, \$ Exchanged Total, # Exchanged Qty Returned, \$ Returned Total, # Returns
Return Reason/Offer (CSRTNO)	# Returns, \$ Returns
Return Reason/Offer/Item (INRROI)	# Returns, \$ Returns

Table	Updates
Salesman (MSSLMN)	# Sales LTD, \$ Sales LTD, incremented for each recipient # Exchanges LTD, \$ Exchanges LTD # Returns LTD, \$ Returns LTD
Ship Via (MSSHPV)	# of Packages TD, # of Packages LTD Freight Collected TD, Freight Collected LTD
Ship Via History (VIAHST)	# of Packages, Freight Collected
SKU Price History (SKUPHT)	# Sales, \$ Sales
Source (MSSRC)	\$ Sales, # Sales, incremented for each shipment \$ Exchanges, # Exchanges \$ Returns, # Returns Requests mailed (if the order type on the order matches the order type in the Order Type to Process as Catalog Request/Item Samples (E08) system control value)
Tax Jurisdiction History (MSTXJH)	Amount charged Amount credited
User Define Exit Point	Execute any user defined exit points that are called during Billing

¹ Entity-level updates take place only if the [Track Customer History at Entity Level \(F89\)](#) system control value is selected.

Working With the EBO ASYNC Job

Purpose: The Evaluate Backorders ASYNC function updates the system tables with reservation and backorder information whenever the inventory level for a backordered item increases. Inventory levels for an item increase when you process inventory transactions, receive purchase orders, or transfer merchandise from suspense.

When the inventory transactions program runs, it sends records to the Evaluate Backorders data queue for processing if the inventory level for a backordered item is increased.

- If the Evaluate Backorders ASYNC (EBO_ASYNC) function is active, it processes the records immediately.
- If the EBO_ASYNC is not active when it receives the records, it processes them as soon as it becomes active again.

All records are processed in the sequence in which they arrive in the data queue.

Pick slip preparation: During the Evaluate Backorders process, the system performs pick slip preparation for each order updated:

1. The system REMOVES any pick slip preparation from the order.
2. Once the Evaluate Backorders async reserves stock for an order, the system EVALUATES the order to determine if it is eligible for pick slip preparation.
3. If the order is eligible for pick slip preparation after the changes to the order have been made, the system RE-APPLIES pick slip preparation to the order.

See [Preparing Orders for Pick Slip Generation](#) for processing details.

Errors: If any errors occur in processing a data queue record, the function stops processing at the error point and starts the next record in sequence. The records in error are listed on the Evaluate Backorders ASYNC Error Report, which prints when the ASYNC jobs end. EBO_ASYNC continues processing any record in error once the error is corrected.

You can view the status of each record in the data queue at the [Display Evaluate B/O Data Queue Screen](#).

For more information: See [Troubleshooting the Async Jobs](#) for more information on the steps you should take if you suspect the async jobs are not running correctly.

In this topic:

- [Display Asynchronous Job Screen \(Displaying the Evaluate Backorders ASYNC Job\)](#)
- [Display Evaluate B/O Data Queue Screen](#)
- [Evaluate B/O Background Job Error Listing](#)
- [Updates During Background Processing.](#)

Display Asynchronous Job Screen (Displaying the Evaluate Backorders ASYNC Job)

Purpose: Use this screen to display the job attributes for each background ASYNC job. This screen displays descriptive information about the ASYNC job.

How to display this screen: Select Display for the EBO_ASYNC job at the [Work with Background Jobs Screen](#).

Field	Description
Process name	The name of the process for this ASYNC job. The name of the evaluate backorders data queue is EVLBODATAQ. Alphanumeric, 10 positions; display-only.
Job name	The name of the ASYNC job. Alphanumeric, 10 positions; display-only.
Description	The description of the ASYNC job. Alphanumeric, 40 positions; display-only.
Start	The date and time the ASYNC job was last started and the User ID of the person who started it. (Date): Numeric, 6 positions; display-only. (Time): Numeric, 6 positions; display-only. User ID): Alphanumeric, 10 positions; display-only.
End	The date and time the ASYNC job was last ended and the User ID of the person who ended it. (Date): Numeric, 6 positions; display-only. (Time): Numeric, 6 positions; display-only. (User ID): Alphanumeric, 10 positions; display-only.
Controlling job?	A flag indicating whether this function controls other ASYNC functions. The controlling ASYNC function starts and ends other ASYNC functions. Valid values are: Selected - This is a controlling ASYNC function. Unselected - This is not a controlling ASYNC function. The CNTL_ASYNC job is the only controlling ASYNC job.

Field	Description
System Option?	A flag indicating whether this function is a system function that cannot be deleted by the user. Valid values are: Selected - This function cannot be deleted by the user. Unselected - This function can be deleted by the user.
Status	The current status of the job. Valid status codes are: • *ACTIVE • *INACTIVE • *ENDPEND • *JOBQ • *REORG Display-only.

Display Evaluate B/O Data Queue Screen

Purpose: This screen displays the records that have been sent to the data queue for processing since the last time the ASYNC function was ended. Records are sent to the data queue when the inventory level for an item is increased.

The status of each record indicates if the record has been processed or if any errors exist.



Note:

If the [Use Inventory Sharing Backorder Evaluation \(I80\)](#) system control value is selected, there is a data queue record only for the shared company (the company where you actually track the inventory). See [Inventory Sharing \(A69\)](#) for an overview.

How to display this screen: Select Display Data Queue for the EBO_ASYNC job on the [Work with Background Jobs Screen](#).

Field	Description
Cmp (Company)	The number of the company for which the transaction was processed. If you are running operations for more than one company, transactions for all companies are submitted to the same data queue. Note: If the Use Inventory Sharing Backorder Evaluation (I80) system control value is selected, there is a data queue record only for the shared company (the company where you actually track the inventory). See Inventory Sharing (A69) for an overview. Numeric, 3 positions; display-only.
Date	The date when the transaction was submitted to the data queue for processing. Numeric, 6 positions (in user date format); display-only.
Time	The time at which the transaction was submitted to the data queue for processing. Note: The number of seconds might exceed 59 if the ASYNC job processed 60 or more records in a minute. Numeric, 6 position (HH:MM:SS format); display-only.

Field	Description
Job #	The job number assigned to the transaction when it was submitted to the data queue. Numeric, 6 positions; display-only.
Processed	The status of the record. The record is either not processed, in process, in error, or processed. A status message displays for each step. Alphanumeric, 30 positions; display-only.
Item	The item number/SKU of the backordered item that can now be reserved. (Item#): Alphanumeric, 12 positions; display-only. (SKU): Alphanumeric, three 4-position fields; display-only.
Whs	The code of the warehouse where the backordered item can be reserved. Numeric, 3 positions; display-only.

Evaluate B/O Background Job Error Listing

Purpose: This listing prints when the background ASYNC jobs are ended. The report lists the records that could not be processed and the reason for the error. The record will be processed when the error is corrected.

- Order #: The order number for which the error occurred.
- Ship to: The ship-to suffix of the order for which the error occurred.
- Order date: The date when the order was entered.
- User: The User ID of the operator who entered the order.
- Update area: The message describing the reason for the error.
- Error ID: The ID number assigned to the error.

Updates During Background Processing

Updates: Evaluate Backorders:

- Updates backorder quantity, reserved quantity, and available quantity in item warehouse
- Creates reserved order lines

Pick slip preparation: During the Evaluate Backorders process, the system performs pick slip preparation for each order updated:

1. The system REMOVES any pick slip preparation from the order.
2. Once the Evaluate Backorders async reserves stock for an order, the system EVALUATES the order to determine if it is eligible for pick slip preparation.
3. If the order is eligible for pick slip preparation after the changes to the order have been made, the system RE-APPLIES pick slip preparation to the order.

See [Preparing Orders for Pick Slip Generation](#) for processing details.

Working With the ORDR_ASYNC Job

Purpose: The Order Processing ASYNC job updates system tables with order and demand information as orders are entered and maintained.

As you enter or maintain orders, the system sends the records to the Order Processing data queue for processing. As soon as the Order Processing Data queue receives a record to process, the record is processed immediately, regardless of the status of the Order Processing ASYNC (ORDR_ASYNC) job. The ORDR_ASYNC job processes multiple orders simultaneously.

If there are any records that the job cannot update, it skips that record and continues.

You can review the status of each record in the data queue at any point by displaying the [Display Order Ship To Data Queue Screen](#).

Quotes: The system does not send quotes to the Order Async until the quote is converted to an order; see [Entering Pre-Order Quotes](#) for an overview.

Related system control value: The [Update Demand for Order Maintenance Transactions \(C72\)](#) controls how this job processes updates.

**Note:**

While the Order Async job does not need to be active to process records, you should set the Order Async job to active to handle reorganization and cleanup of any transactions that did not process correctly.

For more information: See [Troubleshooting the Async Jobs](#) for more information on the steps you should take if you suspect the async jobs are not running correctly.

In this topic:

- [Display Asynchronous Job Screen \(Displaying the Order Processing ASYNC Job\)](#)
- [Display Order Ship To Data Queue Screen](#)
- [Updates During Background Processing](#)

Display Asynchronous Job Screen (Displaying the Order Processing ASYNC Job)

Purpose: Use this screen to display the job attributes for each background ASYNC job, including the Order Processing ASYNC job.

How to display this screen: Select Display for an ASYNC job at the [Work with Background Jobs Screen](#).

Field	Description
Process name	The name of the process for this ASYNC job. The name of the order data queue is ORDERDATAQ. Alphanumeric, 10 positions; display-only.
Job name	The name of the ASYNC job. Alphanumeric, 10 positions; display-only.
Description	The description of the ASYNC job. Alphanumeric, 40 positions; display-only.
Start	The date and time the ASYNC job was last started and the User ID of the person who started it. (Date): Numeric, 6 positions; display-only. (Time): Numeric, 6 positions; display-only. (User ID): Alphanumeric; 10 positions; display-only.

Field	Description
End	The date and time the ASYNC job was last ended and the User ID of the person who ended it. (Date): Numeric, 6 positions; display-only. (Time): Numeric, 6 positions; display-only. (User ID): Alphanumeric; 10 positions; display-only.
Controlling job	A flag indicating whether this job controls other ASYNC functions. The controlling ASYNC job starts and ends other ASYNC functions. Valid values are: - Selected - This is a controlling ASYNC job. - Unselected - This is not a controlling ASYNC job. The CNTL_ASYNC job is the only controlling ASYNC job.
System Option	A flag indicating whether this is a system job that cannot be deleted by the user. Valid values are: - Selected - This job cannot be deleted by the user. - Unselected - This job can be deleted by the user.
Status	The current status of the job. Valid status codes are: *ACTIVE *INACTIVE *ENDPEND *JOBQ *REORG Display-only.

Display Order Ship To Data Queue Screen

Purpose: Use this screen to review the records that have arrived in the data queue for processing since the last time you ended the ASYNC jobs. Records arrive in the data queue for new orders that are entered and for existing orders that are maintained. The status of each record, indicating if the record has been processed or if any errors exist, displays.

How to display this screen: Select Display Data Queue for the ORDR_ASYNC job at the [Work with Background Jobs Screen](#).

Field	Description
Cmp (Company)	The number of the company for which the transaction was processed. If you are running operations for more than one company, transactions for all companies are submitted to the same data queue. Numeric, 3 positions; display-only.
Date	The date when the transaction was submitted to the data queue for processing. Numeric, 6 positions (in user date format); display-only.
Time	The time when the transaction was submitted to the data queue for processing. Note: The number of seconds might exceed 59 if the ASYNC job processed 60 or more records in a minute. Numeric, 6 position (HH:MM:SS format); display-only.

Field	Description
User	The user ID of the user associated with the order transaction. Alphanumeric, 10 positions; display-only.
B/A	A code indicating whether the record represents a before image or an after image for the transaction. After records are written for all transactions; before records are written for orders that have been maintained. Valid codes are: • B = The record represents the order information before the transaction was processed. • A = The record represents the order information after the transaction was processed. Alphanumeric, 1 position; display-only.
Processed	The status of the record. The record is either not processed, in process, in error, or processed. A status message displays for each step. Alphanumeric, 30 positions; display-only.
Ordr #	The order number of the record. (Order #): Numeric, 8 positions; display-only.
Ordr ship to	The order ship-to number of the record. (Ship to): Numeric, 3 positions, display-only.
Trn	A code identifying the job from which the transaction originated. Valid status codes are: • CF = Confirmation • DS = Drop Ship • EB = Evaluate Backorders • OE = Order Entry • OM = Order Maintenance • PM = Purchase Order Maintenance • PR = Receiving • RA = Return Authorization • US = Unspecified Alphanumeric, 2 positions, display-only.

Updates During Background Processing

Purpose: The ORDR_ASYNC job updates system tables with order and demand information as orders are entered and maintained. As you enter or maintain orders, the system sends the records to the Order Processing data queue for processing. As soon as the Order Processing Data queue receives a record to process, the record is processed immediately, regardless of the status of the Order Processing ASYNC (ORDR_ASYNC) job. The ORDR_ASYNC job processes multiple orders simultaneously. While the Order Async job does not need to be active to process records, you should set the Order Async job to active to handle reorganization and cleanup of any transactions that did not process correctly.

Related system control value: The Update Demand for Order Maintenance Transactions (C72) system control value controls whether totals update as a result of order maintenance as well as order entry.

Order count and demand updates for retail pickup and delivery orders: If the originating location on a retail pickup or delivery order is Order Administration, the system does not increase the order count that is displayed on the [About Application Screen](#) or perform any demand updates for the order.

**Note:**

The system identifies the originating location as Order Administration if the request_system_cd in the fulfillment response message matches the system code in the [OROB System \(K50\)](#) system control value and the request_location_cd in the fulfillment response message matches the location in the [Originating Location to Pass to OROB \(M32\)](#) system control value. In this situation, the system prefaces the E-commerce order number in the Order Header Extended table with ORIG#: 9999-001, where ORIG#: indicates the order was created as a result of OROB fulfillment assignment, 9999 is the order number, and 001 is the ship to number. See [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for more information.

Table	Updates
Cancel Reason/Offer (CNCNRO)	Date # canceled qty canceled units canceled Creates a record only if the cancel reason code is flagged not to reduce demand.
CC Authorization Backorder (CCATBO)	Create a record for authorization of a fully backordered order if the Preauthorize Backorders (D32) system control value is selected.
Correspondence History (MSCOHS)	Creates a record for each order confirmation email <i>Outbound Email XML Message (CWEmailOut)</i> generated if the Write Outbound Email to Email Repository (H99) system control value is selected. See the Suppress Order Confirmations for Orders in Error (K09) system control value for a discussion of when the ORDR_ASYNC background job generates order confirmations. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1)
Customer Membership (OECSMP)	Create or deactivate customer loyalty memberships based on total order dollars or customer class. See Loyalty Memberships for an overview.
Customer Sold To (OECSSL)	Original and current mail type Original source Current source (if Update of Current Source Code in Customer File (D08) system control value is selected)
Customer Sold To Entity (OECSEP)	Last order date On order \$ # orders LTD, \$ orders LTD # cancels LTD, \$ cancels LTD # soldouts LTD, \$ soldouts LTD Last source Current mail type Original mail type Active since date Original source code Last source code Updated if the Track Customer History at Entity Level (F89) system control value is selected.

Table	Updates
Customer Sold to Item Class (OECSIC)	# orders LTD, \$ ordered LTD # units ordered LTD # units canceled LTD, \$ canceled LTD # units soldout LTD, \$ soldout LTD Last order date
Customer Sold To Item Class Entity (OEICEP)	Creates records and updates: # orders (not units) # orders LTD, \$ orders LTD # cancels LTD, \$ cancels LTD # soldouts LTD, \$ soldouts LTD Last order date
Customer Sold To Order History (CSTOOH)	On order \$ # orders LTD, \$ orders LTD # soldouts LTD, \$ soldouts LTD # canceled LTD, \$ canceled LTD Last CC# Last expiration date Active since date Last order date Last order type Pay type Current source code Last order amount
Flash Report (FLFLSH)	See Reviewing Operations Control Summary (FLSH) for information on order totals tracked.
Item/Sku/Offer (FCISOF)	Start and end dates Quantity ordered, \$ ordered
Offer (MSOFFR)	Date of first order
Order Control Summary (MSORSU)	# orders entered, \$ orders entered, quantity ordered # orders cancelled, \$ orders cancelled, quantity cancelled # orders soldout/closed, \$ orders soldout, quantity soldout Note: The Billing Async updates the orders shipped, orders exchanged, and invoices credited fields. The batch order control job updates the operation and merchandising fields in the Order Control Summary table; see Reviewing Operations Control Summary (FLSH) .
Order Type/ User (OEOTYU)	# Orders TD, LTD \$ Value - TD, LTD # Receipts TD, LTD # Lines TD, LTD
Order/Billing History (OEBHST)	# orders, \$ order total, qty ordered # soldout, \$ soldout total, qty soldout # canceled, \$ canceled, qty canceled
Price override reason (OEPROR)	# of overrides Total discount

Table	Updates
SKU (INSKU)	Date of first order Date of last order
SKU Price History (SKUPHT)	# orders (actually updated with the total ordered quantity) \$ orders
Soldout Notifications (SONTFY)	Creates records
Source Code (MSSRC)	\$ ordered, soldout, canceled # of orders, soldouts, cancels Date of first order Date of last order Response percent
Tickler	Records created based on related configuration. See Workflow Management Overview and Setup for background.

**Note:**

- Entity-level updates take place only if the [Track Customer History at Entity Level \(F89\)](#) system control value is selected.
- Order maintenance activity updates demand only if the [Update Demand for Order Maintenance Transactions \(C72\)](#) system control value is selected.

Working With the OTHR_ASYNC Job

The Other ASYNC function updates the system tables with purchase order information when purchase orders are entered, maintained, or received.

When purchase orders are entered, maintained, or received, records are sent to the Other data queue for processing. If the Other ASYNC (OTHR_ASYNC) function is active, the records will be processed immediately. If the function is not active when the records are sent, they will be processed as soon as the OTHR_ASYNC function becomes active again. All records are processed in the sequence in which they were sent to the data queue.

If any errors exist, processing for that record stops at the error point. The system begins processing the next record in sequence. The records in error are listed on the P/O Background Job Error Listing, which is printed when the ASYNC jobs are ended. OTHR_ASYNC will continue processing the record when the error has been corrected. You should correct any errors that exist as soon as possible so that your system tables are updated properly. See [Working with OTHR_ASYNC Status Messages](#).

The status of each record in the data queue can be viewed at any point by displaying the [Display PO Header Data Queue Screen](#).

For more information: See [Troubleshooting the Async Jobs](#) for more information on the steps you should take if you suspect the async jobs are not running correctly.

In this topic:

- [Display Asynchronous Job Screen \(Displaying the Other ASYNC Job\)](#)

- [Display PO Header Data Queue Screen](#)
- [Working with OTHR_ASYNC Status Messages](#)
- [P/O Background Job Error Listing](#)
- [Updates During Background Processing.](#)

Display Asynchronous Job Screen (Displaying the Other ASYNC Job)

Purpose: Use this screen to display the job attributes for each background ASYNC job, including the OTHR_ASYNC job. This screen displays descriptive information about the ASYNC job.

How to display this screen: Select Display for the OTHR_ASYNC job at the [Work with Background Jobs Screen](#)

Field	Description
Process name	The name of the process for this ASYNC job. The name of the OTHR_ASYNC data queue is OTHERDATAQ. Alphanumeric, 10 positions; display-only
Job name	The name of the ASYNC job. Alphanumeric, 10 positions; display-only
Description	The description of the ASYNC job. Alphanumeric, 40 positions; display-only.
Start	The date and time the ASYNC job was last started and the User ID of the person who started it. (Date): Numeric, 6 positions; display-only. (Time): Numeric, 6 positions; display-only. (User ID): Alphanumeric; 10 positions; display-only.
End	The date and time the ASYNC job was last ended and the User ID of the person who ended it. (Date): Numeric, 6 positions; display-only. (Time): Numeric, 6 positions; display-only. (User ID): Alphanumeric, 10 positions; display-only.
Controlling job?	A flag indicating whether this function controls other ASYNC functions. The controlling ASYNC function starts and ends other ASYNC functions. Valid values are: • Selected = This is a controlling ASYNC function. • Unselected = This is not a controlling ASYNC function. The CNTL_ASYNC job is the only controlling ASYNC job.
System Option?	A flag indicating whether this function is a system function that cannot be deleted by the user. Valid values are: Selected - This function cannot be deleted by the user. Unselected - This function can be deleted by the user.
Status	The current status of the function. Valid status codes are: • *ACTIVE • *INACTIVE • *ENDPEND • *JOBQ • *REORG Display-only

Display PO Header Data Queue Screen

Purpose: This screen displays the records that have been sent to the data queue for processing since the last time the ASYNC function was ended. Records are sent to the data queue when the inventory level for an item is increased.

The status of each record, which indicates if the record has been processed or if any errors exist, displays.

How to display this screen: Select Display Data Queue for the OTHR_ASYNC job on the [Display Asynchronous Job Screen \(Displaying the Other ASYNC Job\)](#)

Field	Description
Cmp (Company)	The number of the company for which the transaction was processed. If you are running operations for more than one company, transactions for all companies are submitted to the same data queue. Numeric, 3 positions; display-only.
Date	The date on which the transaction was submitted to the data queue for processing. Numeric, 6 positions (in user date format); display-only.
Time	The time at which the transaction was submitted to the data queue for processing. Note: The number of seconds might exceed 59 if the ASYNC job processed 60 or more records in a minute. Numeric, 6 position (HH:MM:SS format); display-only.
User	The User ID of the person who entered the transaction. Alphanumeric, 10 positions; display-only.
B/A	A code indicating whether the record represents a before image or an after image for the transaction. After records are written for all transactions; before records are written for order maintenance transactions. Valid codes are: • Before = The record represents the order information before the transaction was processed. • After = The record represents the order information after the transaction was processed. Alphanumeric, 1 position; display-only.
Processed	The status of the record. The record is either not processed, in process, in error, or processed. A status message displays for each step. Alphanumeric, 30 positions; display-only.
PO#	The number of the purchase order for which the record is being processed. Numeric, 7 positions; display-only.

Field	Description
Trans	A code that identifies the function where the transaction originated. Valid status codes are: • CF = Confirmation • DS = Drop Ship • EB = Evaluate Backorders • OE = Order Entry • OM = Order Maintenance • PM = Purchase Order Maintenance • PR = Receiving • RA = Return Authorization • US = Unspecified Alphanumeric, 2 positions, display-only.

Working with OTHR_ASYNC Status Messages

Purpose: The status of each data queue record can be viewed by displaying the data queue. If an error exists, the message will print on the P/O Background Jobs Error Listing that is printed when the ASYNC jobs are ended. The error must be corrected before the transaction can be fully processed.

OTHR_ASYNC status messages: This table lists the status messages that you may see when displaying the PO Header Data Queue, or when reviewing the [P/O Background Job Error Listing](#). The Error Reason/Action Required section of the table below is incomplete as of this writing.

Message	Message ID	Error Reason/Action Required
Processing has begun		None.
All updates complete		None. The record was fully processed.
Error updating buyers	OA21759	
Error updating Item/ Warehouse	OA21760	
Error updating PO Dtl audit	OA21915	
Error updating PO Hdr audit	OA21916	
Error creating PO layering	OA21897	
Error changing PO layering	OA21920	
Error creating PO layering	OA21918	
Error deleting PO layering	OA21919	
Error updating SKU Offer	OA21758	
Error updating threshold value	OA22968	
Error updating vendor	OA21732	
Error updating vendor history	OA21733	
Error updating vendor items	OA21766	

P/O Background Job Error Listing

Purpose: This report prints when the background ASYNC jobs are ended. The report lists the records that could not be processed and the reason for the error. The record will be processed when the error is corrected.

See [Working with OTHR_ASYNC Status Messages](#) for a complete description of the error messages you may encounter and the steps necessary to correct the error.

Order #: The order number for which the error occurred.

- Ship to: The ship-to suffix of the order for which the error occurred.
- Order date: The date on which the order was entered.
- User: The User ID of the operator who entered the order.
- Update area: The message describing the reason for the error. See [Working with OTHR_ASYNC Status Messages](#).
- Error ID: The ID number assigned to the error. See [Working with OTHR_ASYNC Status Messages](#).

Updates During Background Processing

Purpose: The system performs the following field and table updates during the OTHR_ASYNC procedure:

Function	Field
Update the SKU/Offer table	
---	• SKU CWI work field • SKU on order for PO Threshold values include: • Number and dollar value for Held POs • Number and dollar value for Units of Suspense Inventory • Number and dollar value for PO Receipts in Suspense
Update the Item/Warehouse table	
---	On order quantity
Update PO Layering table	
PO Maintenance + PO Receipts	Creates the record
	Open quantity
PO Receipts	Status
	Note: If you receive inventory into a pending putaway warehouse, the system keeps the PO layering record in an open status until the inventory is moved out of the pending putaway warehouse. See Pending Putaway Overview .
---	Warehouse
---	Due date
Update the Vendor/Item table	
PO Receipts	Shipments - LTD
---	Elapsed days - LTD

Function	Field
---	Late days - LTD
---	Number of late shipments
---	Defects - LTD
---	Undershops
---	Overships
---	Units received - LTD
PO Maintenance	Dollar value purchased - LTD
---	Units purchased - LTD
Update Vendor table	
---	Dollar value cancelled
---	Dollar value held
---	Dollar value open
---	Number of POs - LTD
---	Number of open POs
Update Vendor History table	
---	Dollar value purchase orders
---	Number of purchase orders
Update the Buyer table	
---	Dollar value POs - LTD
---	Number of purchase orders - LTD
Update Vendor Extended table	
---	Dollar value on order
Update IL Outbound Trigger Table	
PO Maintenance	Creates ITW outbound trigger records when you create a purchase order or maintain an open purchase if the Include PO Updates (J93) system control value is selected. See Generic Inventory Download API for an overview and details. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1)

Running Period End Processing

Topics in this part:

- [Working with Periodic Functions \(WPER\)](#) describes working with the functions you can include in your periodic processing.
- [Working with Periodic Processes \(WPPR\)](#) describes how to create, change, delete or display a periodic process.
- [Executing Periodic Processes \(EPRO\)](#) describes how to set up and execute a periodic process.
- [Working with Periodic Process History \(WPHS\)](#) presents the screens you use to review periodic process history.

- [Purge Periodic Process History \(MPPR\)](#) describes how to purge periodic process history in a completed status for all Order Administration companies prior to a specified date.
- [Printing the Tax Jurisdiction Report \(PTXJ\)](#) describes how to run this report and presents a sample.
- [Releasing Orders from Time Hold](#) describes the RLSTIME periodic function.
- Working with the Marketing Download Extract describes how to download order, customer, source code, and vendor information from Order Administration to the DMT system.
- [Using the Financial Data Interface](#) describes how to extract information to the Financial Sales Download table.

Releasing Orders from Time Hold

Purpose: Use the Release Orders on Time Hold (RSLTME) function to release prepaid orders from hold automatically when the number of days to hold the order (in the Hold days field in the Pay Type table) has passed, and to release orders held for credit card authorization.

Prepaid orders: When this job runs, the system checks all open prepaid orders (pay category Cash/Check) to see if the hold days have expired. The system holds prepaid orders automatically for a certain number of days to ensure that the checks clear (you define the hold days in the Pay Type table). The system places these orders on TM hold (Time Hold), which is a system-level hold. Once the checks have cleared, these orders are eligible for pick slip preparation, unless they are on hold for some other reason. By running this program, you have the system release the eligible orders automatically, so you do not have to release them one-by-one.

See [Working with Pay Types \(WPAY\)](#) for information on setting up the Pay Type table.

Credit card orders: This job also evaluates orders placed on hold because of a declined credit card. You can specify a number of days to hold an order based on the response you receive from an authorization service; for example, if a credit card is declined because the customer is over a credit limit, it is unlikely that the customer's credit situation will change significantly in a single day. In this situation, you might set up this vendor response to hold such orders for five days before making these orders eligible for pick slip preparation and attempting authorization again.

Orders that are on hold because of a declined credit card have an order hold reason of AT (failed authorization). See [Working with Credit Card Cancellations \(WCCC\)](#) for a discussion on managing declined authorizations using Order Administration.

Pick slip preparation: When you release an order from hold, the system removes any pick slip preparation that has been applied to the order and then reevaluates the order for pick slip preparation; see [Preparing Orders for Pick Slip Generation](#).

In this topic:

- [Orders Released from Time Hold Report](#)

Define as periodic function: You must define RSLTME as a periodic function with [Working with Periodic Functions \(WPER\)](#).

Sample setup: Enter the following at the [Create Periodic Function Screen](#):

- Function: RLSTIME
- Description: Release Orders on Time Hold
- Company parameter: Y
- Appl area: C/S

- Program name: CSR0557

Add to DAILY periodic process: Next, at the [Work with Periodic Functions Screen](#), select Functions to add this periodic function to your daily periodic process.

Released orders report: The system prints the [Orders Released from Time Hold Report](#) automatically when you execute the Daily Periodic Process, which includes the Release Orders from Time Hold job. If the order is still on user hold, the system displays the user hold reason on the report.

Order history for release: The system logs messages to the Order History table automatically for orders placed on and released from time hold. Select Order History in standard Order Inquiry to advance to the Display Order History screen. This information is also available in streamlined Order Inquiry by selecting History.

History messages: Two messages are logged for orders placed on Time Hold (TM type hold) or credit card hold (AT). The first message is logged automatically when the system places the order on hold.

The second message is logged automatically when the system releases the order after the hold days expire. This message contains:

- the date the order was released from TM or AT hold (although it may remain on hold for other reasons)
- the type of transaction, which is R for "release"
- a transaction note, which identifies the type of activity performed
- the dollar amount of the order
- the user ID of the person who started the periodic process

Using the System Utilities

Topics in this part: The following topics describe the utilities available in the system that are typically used only by the System Administrator.

- [Working with Default Options \(WDFT\)](#) describes how to work with predefined field or program defaults.
- [Consolidating Order Billing History \(MOBH\)](#) describes how to consolidate order billing history.
- [Working with Inventory Resets](#) describes the options available to reset inventory levels when they become out of synch.
- [Reset Allocation Quantities \(MRPC\)](#) describes how to reset the printed quantities for orders.
- [Reset Reserve Quantity \(MRQR\)](#) describes how to reset the reserved quantity of items in inventory.
- [Reset Back Order Quantity \(MRBO\)](#) describes how to reset the backorder quantity of items in inventory.
- [Reset Item Warehouse Quantity On Hand \(MRIW\)](#) describes how to reset the quantity on-hand for each Item Warehouse record based on the total quantities on-hand.
- [Reset SKU Open Order Quantity \(MRSO\)](#) describes how to reset the fields in the SKU table based on the current open orders for the SKU.
- [Unlocking a Stranded Order or Batch \(MULO\)](#) describes how to unlock an order or batch that became locked during processing or maintenance.

- [Resetting the Order Billing History Table \(ROBH\)](#) describes how to reset the Order Billing History table based on the records in the Order Detail table.
- [Resetting Customer Sold To Amount On Order \(RONO\)](#) describes how to reset the On order amount field in the Customer Sold To Order History file so that it matches the amount of any existing open orders for the customer.
- [Unlock Purchase Order \(MUPO\)](#) describes how to reset locked purchase orders and reset the on-order quantities for Item Warehouse records.
- [Work with File Uploads \(WUPL\)](#) describes how to upload a file to a specified table in the Order Administration database.

Working with Inventory Resets

Purpose: Use the following inventory options to reset quantities when inventory levels become out-of-sync due to system problems:

- [Reset Allocation Quantities \(MRPC\)](#)
- [Reset Reserve Quantity \(MRQR\)](#)
- [Reset Back Order Quantity \(MRBO\)](#)
- [Reset Item Warehouse Quantity On Hand \(MRIW\)](#)
- [Reset SKU Open Order Quantity \(MRSO\)](#)



Note:

Do not run these resets when the Billing Async is active, or when you are running pick slip generation or performing inventory transaction processing. Also, do not run the Reserve Quantity Reset or Backorder Quantity Reset while creating or updating orders.

Working with File Imports

Purpose: Your options for uploading file data to Order Administration are:

- File storage API: Use the file storage API to import files for most types of imports, as well as deleting files that are no longer needed. See the [Available File Uploads](#) for details.
- The file storage API stages uploaded file data in the FILE_STORAGE database table. Upload processes point to the FILE_STORAGE table when retrieving data to update target database tables. See [File Storage API](#).
- The file storage API also supports exporting files. See [File Storage API](#).
- Work with File Uploads (WUPL): You can use this menu option to upload files. When you upload a file through this menu option, if the file contents need to first be placed in a staging database table before processing, the upload process populates the staging table with the file data.

Regardless of how the upload file contents are retrieved or staged, you then need to update the destination table in the Order Administration database with the uploaded data. The file layouts, edits, and periodic processes are the same, regardless of the method you use to upload the data.

In this topic:

- [File Upload Setup](#)
- [File Upload Process](#)
- [Populating the Upload File](#)
- [Processing File Uploads through Work with File Uploads \(WUPL\)](#)
- [Available File Uploads](#)
- [Purging Upload History](#)
- [Sample Upload Data](#)

File Upload Setup

Before you can use the file upload process, you must complete the required setup.

- [File Upload Properties](#)
- [Available File Uploads](#)

File Upload Properties

Order Administration uses the following properties to process a file upload.

Property Name	Description
FILE_STORAGE_MAX_SIZE Located in Working with Customer Properties (PROP) .	The maximum size, in bytes, of a file that can be uploaded to the FILE_STORAGE table. If a file's size exceeds this maximum, the API returns a 403 error and the upload fails. Uploaded files should be less than 1G in size, so this property should be set to 1073741824 or less.
CWDIRECTCP_UPLOAD_BATCH_SIZE Located in Working with Admin Properties (CPRP).	Defines the number of records to process in an upload file at a time. The default setting is 2500, indicating the system inserts records from the upload file into the Order Administration database in batches of 2500. If a record in a batch contains an error, the system does not insert any of the records in the batch into the Order Administration database and places the upload file in an error status. For troubleshooting purposes, you can decrease the UPLOAD_BATCH_SIZE and reprocess the file upload to help you determine which record contains the error. Example: In this example, the CWDIRECTCP_UPLOAD_BATCH_SIZE is 10. You process an upload file containing 30 records. In this situation, the system processes the upload file in 3 batches: the first batch contains records 1-10; the second batch contains records 11-20; and the third batch contains records 21-30. If a record in the second batch fails, the system does not process any of the records in the second batch, but does process all of the records in the first batch and third batch.
CWDIRECTCP_USPS_UPLOAD_FILE Located in Working with Customer Properties (PROP).	Defines the location of the USPS Zip Codes upload file.
STORE_FILE_PATH Located in Working with Customer Properties (PROP).	Defines the path used for the Stores upload file. Note: This property is defined by Oracle and cannot be changed.

File Upload Process

The file upload process includes the following steps:

- [Populating the Upload File](#)
- Using the [File Storage API](#) or [Processing File Uploads through Work with File Uploads \(WUPL\)](#)
- Processing staged data: Some uploads, such as [Catalog Requests](#), initially populate an intermediate table in the database. For these uploads, you need to run an additional process to use the contents of the intermediate table to populate the destination table. Uploads that require the use of a staging table are described under [Available File Uploads](#).

Populating the Upload File

The file upload requires you to identify the file containing the data to upload to the Order Administration database. You can create an upload file by:

- creating your own text file, using a text editor or spreadsheet application, or
- copying the sample file upload data, pasting the data into a text editor, and saving it with the file extension .txt, unless otherwise indicated. See [Sample Upload Data](#).

Important:

In order to leave any field in an upload file blank, pass a space in an alphanumeric field and a 0 in a numeric field so that the file can be processed without errors. Leaving a field with no space or 0 is interpreted as null in the database and causes errors.

Processing File Uploads through Work with File Uploads (WUPL)

Run or schedule a file upload periodic function (see [Available File Uploads](#)) or use the Work with File Upload Screen to upload a file to a specified table in the Order Administration database.

Completing the Work with File Upload Screen

1. Use the File Name field to select the file to upload.
2. Use the File Type field to specify the type of upload to perform.
3. Select Submit File Upload.

File Upload Process

The system:

- Clears all records from the target table in the Order Administration database. **Note:** The system performs this step for each file type except Retail Integration Items.
- Moves the upload file to the directory defined in the CWDIRECTCP_UPLOAD_DIRECTORY property (CPRP); however, the USPS Zip Code Upload uses the CWDIRECTCP_USPS_UPLOAD_FILE directory, and the Sales Rep Upload uses the ASSOCIATE_FILE_PATH (CPRP).

 Note:

When you use Work with File Upload (WUPL), the upload file remains in this folder until you run the periodic function to populate the destination table, as described in the next step.

- Uses a bulk insert to load the records in the upload file into the specified table in the Order Administration database. The CWDIRECTCP_UPLOAD_BATCH_SIZE property defines the batch size used to process the records in the upload file. For example, if this setting is set to 2500, the system inserts records from the upload file into the Order Administration database in batches of 2500.

The Work with File Upload Screen displays the upload history record in the lower portion of the screen.

A Completed Status indicates all records in the file were processed successfully.

- An Error status indicates a record in the upload batch failed to upload to the database successfully. In this situation, the system does not insert any record in the batch into the Order Administration database. The system places the file upload in an Error status and a description of the first error encountered is assigned to the upload history record so that you can correct the error. Select View Error to display a description of the error that occurred during processing. The error description provides the upload batch number that failed to process.

 Important:

If you run the file upload process and an upload file does not exist to process, or if an error occurs during processing, the system will still clear the records in the associated Order Administration upload table. You must correct any errors and run the file upload process again to populate the associated Order Administration upload table.

Processing example: To import [Catalog Requests](#) through the file storage API:

1. Create or obtain the Catalog Request file named IXCRIN.txt. See the [Sample Catalog Requests Upload Data](#) for sample contents.
2. Use the Work with File Upload Screen to upload the IXCRIN.txt file.
3. This clears and populates the Catalog Request Interface table (IXCRIN). Also, the system creates a file upload record, viewable at the Work with File Upload Screen.
4. Use the Work with Catalog Request Interface (WCRU) menu option to process the records in the Catalog Request Interface table; see [Working with the Catalog Request Interface \(WCRU\)](#).

Troubleshooting the File Upload

Logging: During the file upload process, the system writes messages to the Trace log if its logging level is set to Debug or lower.

Example of log entries for successful file upload:

```
11:39:18,270 DEBUG TRACE - Upload started for /domain/OMSFiles/File/Uploads/RIItemUpload50Records.txt
11:39:18,293 DEBUG TRACE - Upload completed for /domain/OMSFiles/File/Uploads/
```



```
RIItemUpload50Records.txt
11:39:18,293 DEBUG TRACE - Upload file processing started for /domain/
OMSFiles/File/Uploads/RIItemUpload50Records.txt
11:39:18,316 DEBUG TRACE - Upload file is RIItemUpload50Records.txt
11:39:18,434 DEBUG TRACE - Upload file processing ended for /domain/OMSFiles/
File/Uploads/RIItemUpload50Records.txt
11:39:48,814 DEBUG TRACE - Upload started for /domain/OMSFiles/File/Uploads/
RIItemUpload50Records.txt
11:39:48,826 DEBUG TRACE - Upload completed for /domain/OMSFiles/File/Uploads/
RIItemUpload50Records.txt
11:39:48,826 DEBUG TRACE - Upload file processing started for /domain/
OMSFiles/File/Uploads/RIItemUpload50Records.txt
11:39:48,840 DEBUG TRACE - Upload file is RIItemUpload50Records.txt
11:39:48,853 DEBUG TRACE - Upload path and file is /domain/OMSFiles/File/
Uploads/RIItemUpload50Records.txt
11:39:48,865 DEBUG TRACE - 10 RIItemUpload50Records.txt upload records have
been processed so far.
11:39:48,897 DEBUG TRACE - 20 RIItemUpload50Records.txt upload records have
been processed so far.
11:39:48,905 DEBUG TRACE - 30 RIItemUpload50Records.txt upload records have
been processed so far.
11:39:48,912 DEBUG TRACE - 40 RIItemUpload50Records.txt upload records have
been processed so far.
11:39:48,916 DEBUG TRACE - 49 RIItemUpload50Records.txt total upload records
were processed.
11:39:48,923 DEBUG TRACE - Upload file processing ended for /domain/OMSFiles/
File/Uploads/RIItemUpload50Records.txt
```

Example of log entries for failed file upload: If an error occurs during processing, the log indicates which batch did not process successfully. Notice in this example, the third batch of records did not process.

```
11:41:17,811 DEBUG TRACE - Upload started for /domain/OMSFiles/File/Uploads/
RIItemUpload50Records.txt
11:41:17,820 DEBUG TRACE - Upload completed for /domain/OMSFiles/File/Uploads/
RIItemUpload50Records.txt
11:41:17,820 DEBUG TRACE - Upload file processing started for /domain/
OMSFiles/File/Uploads/RIItemUpload50Records.txt
11:41:17,833 DEBUG TRACE - Upload file is RIItemUpload50Records.txt
11:41:17,861 DEBUG TRACE - Upload file processing ended for /domain/OMSFiles/
File/Uploads/RIItemUpload50Records.txt
11:41:44,814 DEBUG TRACE - Upload started for /domain/OMSFiles/File/Uploads/
RIItemUpload50Records.txt
11:41:44,824 DEBUG TRACE - Upload completed for /domain/OMSFiles/File/Uploads/
RIItemUpload50Records.txt
11:41:44,824 DEBUG TRACE - Upload file processing started for /domain/
OMSFiles/File/Uploads/RIItemUpload50Records.txt
11:41:44,837 DEBUG TRACE - Upload file is RIItemUpload50Records.txt
11:41:44,847 DEBUG TRACE - Upload path and file is /domain/OMSFiles/File/
Uploads/RIItemUpload50Records.txt
11:41:44,863 DEBUG TRACE - 10 RIItemUpload50Records.txt upload records have
been processed so far.
11:41:44,871 DEBUG TRACE - 20 RIItemUpload50Records.txt upload records have
been processed so far.
11:41:44,957 DEBUG TRACE - 49 RIItemUpload50Records.txt total upload records
```

were processed.
11:41:44,977 DEBUG TRACE - Upload file processing ended for /domain/OMSFiles/
File/Uploads/RIItemUpload50Records.txt

Error processing: If any record in an upload batch is in error, the system does not insert any record in the batch into the Order Administration database. The system places the upload batch in an error status and a description of the first error encountered is assigned to the associated upload history record so that you can correct the error. You can select View Error to display a description of the error that occurred during processing.

If you are unable to determine which record in the upload batch is in error, you can decrease the batch size defined for the CWDIRECTCP_UPLOAD_BATCH_SIZE setting in the CWDirectCP Properties file and reprocess the records in the batch to narrow down the record that is in error. For example, if you normally process a batch size of 2500 records, for troubleshooting purposes, you can temporarily change the batch size to 10 and reprocess. The system will process the records in the upload file in batches of 10 records and fail the upload batch that contains the error. In this example, only 10 records will exist in the batch to help you determine where the error occurred.

**Note:**

The system places the upload batch in an error status for the first error encountered. When you reprocess the upload file after correcting the error, the file may be placed in an error status again if another error is found during processing.

Error related to large batch size: An upload file is placed in an error status with the error message Stopped waiting for file to upload when a large file does not transfer from a user's local machine to the Order Administration application server within 20 minutes. To correct this issue, upload the file in smaller sections to accommodate the slow upload speed or get a faster internet connection.

Other possible errors: A file upload might also fail because:

- There is a blank line at the end of the file.
- The file is not UTF-8 encoded.

Available File Uploads

Upload steps: You can upload records to the following tables in the Order Administration database. Use the processing steps listed below to upload the data in a text file and then process the file data to populate the target table.

Using file storage API: The steps listed below under To Process for each upload assume that you have used the putFile web service method to upload the file. The file content is staged in the OMS-IMPORT container of the FILE_STORAGE table. See [File Storage API](#) for background. You will need to then run the periodic functions listed below for each upload in order to use the record in the FILE_STORAGE table to update to the target table.

Example: After you upload the PO Layering file record to the FILE_STORAGE table, run the UPPOLAY Upload PO Layering File (Program name PFR0134, Parameter POLAYR) periodic function to upload a PO Layering file named POLAYR.txt to the PO Layering table (POLAYR).

Staging table? Some of the uploads listed below initially update a staging table, and require an additional step to use the staged data to update the target table. Others can update the target table directly from the contents of the uploaded file without the use of a staging table.

Periodic processes: Some of file uploads listed below require the use of two periodic functions for processing. For example, to run the Customer Price Group Exclusions upload, you need to first run the CPGIXUP periodic function, and then the CPGIXUP periodic function. You can set up a periodic process to run these two functions.

File Upload screen: Regardless of whether the file storage API is enabled for imports, you can accomplish file uploads from the Work with File Upload Screen for each of the uploads listed below, with the exception of the batch inventory overlay import. In most cases, the upload from this screen also executes the required periodic function to process the uploaded data.

See [File Upload Process](#) for instructions on using the File Storage process or the upload from the CWDIRECTCP_UPLOAD_DIRECTORY.

File Type	Order Administration Upload Table	To Process	Sample Upload Data
ACS Tape	ACS Tape table (CSACST)	After using the putFile method to upload the file (File Storage API), run the UPACSTP Upload ACS Tape File (Program name PFR0134, Parameter CSACST) periodic function to upload an ACS Tape file named CSACST to the ACS Tape table (CSACST). Note: This step is not necessary if you use the Work with File Upload Screen to upload the ACS Tape file. Update target table: After populating the ACS Tape table, you must use the Process Address Changes (PACS) menu option, selecting an Input File Type of ACS, to process the records in the ACS Tape table; see Loading Address Updates.	Sample ACS Tape Upload Data

File Type	Order Administration Upload Table	To Process	Sample Upload Data
Batch Inventory Overlay Upload	N/A: updates the Item Location table directly	After using the putFile method to upload the file (File Storage API), run the INVOVRL periodic function. Processing File Uploads through Work with File Uploads (WUPL) is not supported for the batch inventory overlay upload.	See <i>Batch Inventory Overlay Upload</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Catalog Requests	Catalog Request Interface table (IXCRIN)	After using the putFile method to upload the file (File Storage API) or placing the file in the CWDIRECTCP_UPLOAD_DIRECTORY, run the UPCATRQ Upload Catalog Request File (Program name PFR0134, Parameter IXCRIN) periodic function to upload a Catalog Request file named IXCRIN to the Catalog Request Interface table (IXCRIN). Note: This step is not necessary if you use the Work with File Upload Screen to upload the Catalog Request file. Update target table: After populating the Catalog Request Interface table, you must use the Work with Catalog Request Interface (WCRU) menu option to process the records in the Catalog Request Interface table; see Working with the Catalog Request Interface (WCRU).	Sample Catalog Requests Upload Data

File Type	Order Administration Upload Table	To Process	Sample Upload Data
Cust Price Group Exclusions	Customer Price Group SKU Exclusion Upload Table (CUSTPGEUP)	After using the putFile method to upload the file (File Storage API) or placing the file in the CWDIRECTCP_UPLOAD_DIRECTORY, run the UPCSTPG Upload Customer Price Group Exclusion File (Program name PFR0134, Parameter CUSTPGEUP) periodic function to upload a Customer Price Group Exclusion file named CUSTPGEUP to the Customer Price Group SKU Exclusion Upload table (CUSTPGEUP). Note: This step is not necessary if you use the Work with File Upload Screen to upload the Customer Price Group Exclusion file. Update target table: After populating the Customer Price Group SKU Exclusion Upload table, use the CPGIXUP Customer Price Group SKU Exclusion Upload periodic function (Program name PFRCPGEXUP) to process the records in the upload table; see Customer Price Group SKU Exclusion Upload.	Sample Customer Price Group Exclusions Upload Data
MBS Tape	MBS Tape table (CSMBST)	After using the putFile method to upload the file (File Storage API) or placing the file in the CWDIRECTCP_UPLOAD_DIRECTORY, run the UPMBSTP Upload MBS Tape file (Program name PFR0134, Parameter CSMBST) periodic function to upload an MBS Tape file named CSMBST to the MBS Tape table (CSMBST). Note: This step is not necessary if you use the Work with File Upload Screen to upload the MBS Tape file. Update target table: After populating the MBS Tape file table, use the Process Address Changes (PACS) menu option to process the records in the MBS Tape table; see Loading Address Updates.	Sample MBS Tape Upload Data

File Type	Order Administration Upload Table	To Process	Sample Upload Data
PO Layering	PO Layering Table (POLAYR)	After using the putFile method to upload the file (File Storage API) or placing the file in the CWDIRECTCP_UPLOAD_DIRECTORY, run the UPPOLAY Upload PO Layering File (Program name PFR0134, Parameter POLAYR) periodic function to upload a PO Layering file named POLAYR.txt to the PO Layering table (POLAYR). Once the records are uploaded to the PO Layering table, the process uses the newly uploaded records to update the due date and backorder quantity for order lines on backorder. Note: When you run purchase order layering, the system clears the PO Layering table and rebuilds it based on the purchase order records that are uploaded to the table. In order to ensure accurate updates, you must upload the PO Layering table with ALL open purchase orders every time you perform an upload. Note: This step is not necessary if you use the Work with File Upload Screen to upload the PO Layering file. See Purchase Order Layering.	Sample PO Layering Upload Data

File Type	Order Administration Upload Table	To Process	Sample Upload Data
Price Codes	Price Code Upload Table (PriceCdUpload)	After using the putFile method to upload the file (File Storage API) or placing the file in the CWDIRECTCP_UPLOAD_DIRECTORY, run the UPPRCCD Upload Price Code File (Program name PFR0134, Parameter PRICECDUPLOAD) periodic function to upload a Price Code file named PRICECDUPLOAD to the Price Code Upload Table (PriceCdUpload). Note: This step is not necessary if you use the Work with File Upload Screen to upload the Price Code upload file. Update target table: You must run the PCUPLD Price Code Upload periodic function (Program name PFPRCCODUP) to process the records in the Price Code Upload table; see Price Code Upload.	Sample Price Codes Upload Data
Promotions	Promotion Upload Table (PRMUPLD)	After using the putFile method to upload the file (File Storage API) or placing the file in the CWDIRECTCP_UPLOAD_DIRECTORY, run the UPPROMO Upload Promotion Code File (Program name PFR0134, Parameter PRMUPLD) periodic function to upload a Promotion file named PRMUPLD to the Promotion Upload Table (PRMUPLD). Note: This step is not necessary if you use the Work with File Upload Screen to upload the Promotion upload file. Update target table: You must run the PRMOUPL Create or Delete Promotions periodic function (Program name PRMOUPL) or use the Work with Promotion Values (WPRO) menu option to process the records in the Promotion Upload table; see Promotion Upload.	Sample Promotions Upload Data

File Type	Order Administration Upload Table	To Process	Sample Upload Data
Retail Integration Items	RI Item Upload Table (RIIUPP) Note: You cannot use the UPRITEM Upload Retail Item File (Program name PFR0134, Parameter RIIUPP) periodic function or the Work with File Upload Screen to process imports from RMFCS, although completed RMFCS imports are listed at the Work with File Upload screen.	After using the putFile method to upload the file (File Storage API) or placing the file in the CWDIRECTCP_UPLOAD_DIRECTORY, run the UPRITEM Upload Retail Item File (Program name PFR0134, Parameter RIIUPP) periodic function to upload a Retail Integration Item file named RIIUPP to the RI Item Upload Table (RIIUPP). Note: This step is not necessary if you use the Work with File Upload Screen to upload the Retail Integration Item file. Update target table: After uploading the file, run the RIUPLD Retail Integration Item Upload periodic function (Program name PFR0084) or use the Work with Retail Integration Item Upload (RIIU) menu option to process the records in the RI Item Upload table; see Working with Retail Integration Item Upload (RIIU) .	Sample Retail Integration Items Upload Data

File Type	Order Administration Upload Table	To Process	Sample Upload Data
Sales Associates	Salesman Associate File	After using the putFile method to upload the file, run the SLSUPLD (Program name PFR0109) periodic function to update the target table; see Salesman Associate Upload. This step is not necessary if you use the Work with File Upload Screen to upload the Salesman Associate file to the ASSOCIATE_FILE_PATH (CPRP). File name: The name of the file must start with SR and have a .TXT file extension; for example: SR00001.TXT and SR00002.TXT. If there are multiple eligible files, they are processed sequentially based on file name; SR00001 processes before SR00002. If you use the file storage API for imports, you can upload a zip file that contains a single text file with the same name, for example: SR00001.ZIP containing a text file named SR00001.TXT. See Salesman Associate Upload for more information. Note: The SLSUPLD periodic function uses the folder defined in the ASSOCIATE_FILE_PATH (CPRP) rather than the CWDIRECTCP_UPLOAD_DIRECTORY.	Sample Sales Associates Upload Data

File Type	Order Administration Upload Table	To Process	Sample Upload Data
Source Codes	Source Upload Table (IXSRCE)	After using the putFile method to upload the file (File Storage API) or placing the file in the CWDIRECTCP_UPLOAD_DIRECTORY, run the UPSRCCD Upload Source Code File (Program name PFR0134, Parameter IXSRCE) periodic function to upload a Source Code file named IXSRCE to the Source Upload Table (IXSRCE). Note: This step is not necessary if you use the Work with File Upload Screen to upload the Source Code file. Update target table: You must use the Work with Source Code Upload (WSRW) menu option to process the records in the Source Code Work table; see Generating Source Codes Using the Source Upload Table (WSRW).	Sample Source Codes Upload Data
Stores	Store File	File upload: Use the Work with File Upload Screen to upload the Store file to the STORE_FILE_PATH. The file name must begin with ST and have a .TXT file extension; see Store Upload. Update target table: Run the STRUPLD periodic function. This function uses the folder defined in the STORE_FILE_PATH rather than the CWDIRECTCP_UPLOAD_DIRECTORY. Note: Uploading the Store file through the file storage API is not currently supported.	Sample Stores Upload Data

File Type	Order Administration Upload Table	To Process	Sample Upload Data
USPS Zip Codes	USPS Zip Codes Upload	Use the putFile method to upload the file if you are using the File Storage API; otherwise, place the file in the CWDIRECTCP_UPLOAD_FILE and use the Work with File Upload Screen to upload the USPS Zip Codes file. Update target table: After uploading the file, use the Load USPS Zip Code File (LZPS) menu option to process the uploaded file. The file name must be ctystate.txt, and file name matching is case-sensitive. See Fields in the USPS Zip/City/State Table and Fields in the USPS Zip/City/State Table for background.	Sample USPS Zip Codes Upload Data
Vendors	Vendor Upload Table (VNDUPL)	After using the putFile method to upload the file (File Storage API), or placing the file in the CWDIRECTCP_UPLOAD_DIRECTORY, run the UPVENDR Upload Vendor File (Program name PFR0134, Parameter VNDUPL) periodic function to upload a Vendor file named VNDUPL to the Vendor Upload Table (VNDUPL). Note: This step is not necessary if you use the Work with File Upload Screen to upload the Vendor Upload file. Update target table: After uploading the file, run the VNDUPLD Vendor Upload periodic function (Program name PFR0086) or use Working with Vendor Upload (LVUP) to process the records in the Vendor Upload table.	Sample Vendors Upload Data

Purging Upload History

PURGEUP: Run the PURGEUP Purge Upload History Table (program name PFR0126) periodic function to purge Upload History records that are older than the number of days specified in the Parameter field. If the Parameter field is blank or 0, records must be 21 days old to be eligible for purge.

Sample Upload Data

You can use the sample upload data below as a starting point to creating your own upload file by copying the sample file upload data, pasting the data into a text editor, and saving it with the file extension .TXT, unless otherwise indicated.

! Important:

In order to leave any field in an upload file blank, pass a space in the field so that the file can be processed without errors. Leaving a field with no space is interpreted as null in the database and causes errors.

- [Sample ACS Tape Upload Data](#)
- [Sample Catalog Requests Upload Data](#)
- [Sample Customer Price Group Exclusions Upload Data](#)
- [Sample MBS Tape Upload Data](#)
- [Sample PO Layering Upload Data](#)
- [Sample Price Codes Upload Data](#)
- [Sample Promotions Upload Data](#)
- [Sample Retail Integration Items Upload Data](#)
- [Sample Sales Associates Upload Data](#)
- [Sample Set Components Upload Data](#)
- [Sample Source Codes Upload Data](#)
- [Sample Stores Upload Data](#)
- [Sample USPS Zip Codes Upload Data](#)
- [Sample Vendors Upload Data](#)

Sample ACS Tape Upload Data

Use the sample data below to create an ACS Tape upload file. See [ACS Tape](#) for a setup summary, and [Loading Address Updates](#) for processing information.

```
200000145BXBKCCJ21263204414      200206F 038ANDERSON      JEN
                                   S                                   1234
      EXAMPLE                      CIR                      HALETHORPE
                                   MD21227S                      123      MARY
WAY                               CT                      LINTHICUM HEIGHTS
                                   MD21090-1754533453 MARY WAY CT
                                   XX0000                      C
```

Sample Catalog Requests Upload Data

Use the sample data below to create a Catalog Requests upload file. See [Catalog Requests](#) for a setup summary, and Working with the Catalog Request Interface (WCRU) for processing information.

```
34 SAMPLE STREET|APT123|ADDRESS LINE 2|ADDRESS LINE 3|ADDRESS LINE 4|
WESTBOROUGH|01581||MA|US|5085550100||thomasbrown@example.com|01|R|
COMPANY NAME|SOURCE7|7|1150417|207|5085550101||5085550102||MS.|MARY|M|
JOHNSON||MARYJOHNSON@EXAMPLE.COM||5085550104|5085550105|5085550106|1|
1|01
```

Sample Customer Price Group Exclusions Upload Data

Use the sample data below to create a Customer Price Group Exclusions upload file. See [Cust Price Group Exclusions](#) for a setup summary, and `../marketing/c_customer_price_group_sku_exclusion_upload.dita#customerpricegroupskuexclusionupload` for processing information.

```
7|1|CPG|RF123SKU4567|ROSE XXML WMNS||
```

Sample MBS Tape Upload Data

Use the sample data below to create an MBS Tape upload file. See [MBS Tape](#) for a setup summary, and [Loading Address Updates](#) for processing information.

```
JOHN                                SMITH                                1 TEST DRIVE
                                     WESTBORO
                                     B
MA01581                             I
                                     01581
                                     B
                                     1 TEST DRIVE
                                     WESTBORO      MA
1 TEST DRIVE APT 2
                                     WESTBORO      MA01581
B                                12879000|
```

Sample PO Layering Upload Data

Use the sample data below to create a PO Layering upload file. See [PO Layering](#) for a setup summary, and [Purchase Order Layering](#) for processing information.

```
7|RF123SKU4567|ROSE XXML WMNS|4|53|1|1080915|20| |Ref#
```

Sample PCO Price Code Upload Record Type

Use the sample data below to create a Price Codes upload file. See [Price Codes](#) for a setup summary, and [Price Code Upload](#) for processing information.

- [Sample PCO Price Code Upload Record Type](#)
- [Sample PCC Price Code Customer Upload Record Type](#)
- [Sample PCD Price Code Detail Upload Record Type](#)

Sample PCO Price Code Upload Record Type

```
7|1|PCO|U|1150416|1234567|PRICE CODE UPLOAD|1|1|5.00|0.00|0.00|0.00|
0.00|0.00|ITEM|Y|1150401|1150501||||0||||
```

Sample PCC Price Code Customer Upload Record Type

```
7|2|PCC|U|1150416|1234567||0|0|.00|.00|.00|.00|.00|.00|||0|0||||
55||||
```

Sample PCD Price Code Detail Upload Record Type

```
7|3|PCD|U|1150416|1234567||0|0|.00|.00|.00|.00|.00|.00||0|0|SKU|RED||
SOURCE7|0||||
```

Sample Promotions Upload Data

Use the sample data below to create a Promotions upload file. See [Promotions](#) for a setup summary, and [Promotion Upload](#) for processing information.

- [Sample PRM Order Promotion Upload Record](#)
- [Sample PRM Freight Promotion Upload Record](#)
- [Sample PRM Additional Freight Promotion Upload Record](#)
- [Sample PRM Item Category Promotion Upload Record](#)
- [Sample PRM Tiered Promotion Upload Record](#)
- [Sample PRM BOGO Promotion Upload Record](#)
- [Sample PRM Delete Promotion Upload Record](#)
- [Sample PRB BOGO Promotion Upload Record](#)
- [Sample PBP BOGO by Price Code Promotion Upload Record](#)
- [Sample PMD Discount Promotion Upload Record](#)
- [Sample PRS Source Promotion Upload Record](#)
- [Sample PRC Customer Promotion Upload Record](#)
- [Sample PIC Item Category Promotion Upload Record](#)
- [Sample PIE Item Exclusion Promotion Upload Record](#)

Sample PRM Order Promotion Upload Record

```
7|PRM|A|1|1150414||PUORDER|PUORDER PROMOTION DESCRIPTION|1150401|
1150601|POPUP WINDOW MESSAGE 1|POPUP WINDOW MESSAGE 2|POPUP WINDOW
MESSAGE 3|POPUP WINDOW MESSAGE 4|1|O|PROMOID|5.95||.00||||1|OA|WEB|
4|4|US||N|O||1|.00|10||||0|0|.00|.00|.00||0|||.00|0|0|
0|.00|.00|.00|||||.00|.00||||0||||0|.00|5.00|.00
```

Sample PRM Freight Promotion Upload Record

```
7|PRM|A|2|1150414||PUFRT|PUFRT PROMOTION DESCRIPTION|1150401|1150601|
POPUP WINDOW MESSAGE 1|POPUP WINDOW MESSAGE 2|POPUP WINDOW MESSAGE 3|
POPUP WINDOW MESSAGE 4|2|F|PROMOID|6.95|Y|.00||||1|Y|WEB|4|4|US||N|
O||1|.00|10||||0|0|.00|.00|.00||0|||.00|0|0|
0|.00|.00|.00|||||.00|.00||||0||||0|.00|.00|.00
```

Sample PRM Additional Freight Promotion Upload Record

```
7|PRM|A|3|1150414||PUADLFR|PUADLFR PROMOTION DESCRIPTION|1150401|
1150601|POPUP WINDOW MESSAGE 1|POPUP WINDOW MESSAGE 2|POPUP WINDOW
MESSAGE 3|POPUP WINDOW MESSAGE 4|3|A|PROMOID|5.00||.00||||1|Y|A|WEB|
4|4|US||N|O||1|.00|10||||0|0|.00|.00|.00||0|||.00|0|0|
0|.00|.00|.00|||||.00|.00||||0||||0|.00|.00|.00
```

Sample PRM Item Category Promotion Upload Record

```
7|PRM|A|4|1150414||PUITMCT|PUITMCT PROMOTION DESCRIPTION|1150401|
1150601|POPUP WINDOW MESSAGE 1|POPUP WINDOW MESSAGE 2|POPUP WINDOW
MESSAGE 3|POPUP WINDOW MESSAGE 4|4|C|PROMOID|5.95||.00||||1||WEB|4|
```

```
0|||N|O|O|1|10.00|10|||0|0|.00|.00|.00|||0|||.00|0|0|
0|.00|.00|.00|||0|.00|||0|||0|.00|.00|.00
```

Sample PRM Tiered Promotion Upload Record

```
7|PRM|A|5|1150414||PUTIERD|PUTIERD PROMOTION DESCRIPTION|1150401|
1150601|POPUP WINDOW MESSAGE 1|POPUP WINDOW MESSAGE 2|POPUP WINDOW
MESSAGE 3|POPUP WINDOW MESSAGE 4|5|T|PROMOID|0||.00|||0|||0|0|||
1|.00|0|||0|0|.00|.00|.00|||0|||.00|0|0|
0|.00|.00|.00|||0|.00|||0|||0|.00|.00|.00
```

Sample PRM BOGO Promotion Upload Record

```
7|PRM|A|6|1150414||PUBOGO|PUBOGO PROMOTION DESCRIPTION|1150401|
1150601|POPUP WINDOW MESSAGE 1|POPUP WINDOW MESSAGE 2|POPUP WINDOW
MESSAGE 3|POPUP WINDOW MESSAGE 4|6|B|PROMOID|0.00||.00|||0|||WEB|4|
0|||N|O||1|.00|10|||0|0|.00|.00|.00|||0|||.00|0|0|
0|.00|.00|.00|||0|.00|||0|||0|.00|.00|.00
```

Sample PRM Delete Promotion Upload Record

```
7|PRM|D|7|1150414||PUDELTE|PUDELTE PROMOTION DESCRIPTION|1150401|
1150601|POPUP WINDOW MESSAGE 1|POPUP WINDOW MESSAGE 2|POPUP WINDOW
MESSAGE 3|POPUP WINDOW MESSAGE 4|7||PROMOID|5.00||.00|||1|Y|N|WEB|4|
4|US|SOURCE7|N|O|O|1|.00|10|||0|0|.00|.00|.00|||0|||.00|0|0|
0|.00|.00|.00|||0|.00|||0|||0|.00|.00|.00
```

Sample PRB BOGO Promotion Upload Record

```
7|PRB|A|8|1150414||BOGO1|PUBGOB PROMOTION DESCRIPTION|0|0|||0|||
0.00||.00|||0|||0|0|||0|.00|0||SKU|RED|1|1|5.00|.00|.00|Y|N|
0|||.00|0|0|0|.00|.00|.00|||0|.00|||0|||0|.00|.00|.00
```

Sample PBP BOGO by Price Code Promotion Upload Record

```
7|PBP|A|9|1150414||BOGO1|PUBGOP PROMOTION DESCRIPTION|0|0|||0|||
0.00||.00|||0|||0|0|||0|.00|0|||0|0|.00|.00|.00|||101||50.00|
1|101|1|5.00|.00|.00|N|Y|N|||.00|.00|||0|||0|.00|.00|.00
```

Sample PMD Discount Promotion Upload Record

```
7|PMD|A|10|1150414||TG|TG TIER PROMOTION DESCRIPTION|0|0|||0|||
0.00||.00|||0|||0|0|||0|.00|0|||0|0|.00|.00|.00|||0|||.00|0|0|
0|.00|.00|.00|||0|.00|.00|SKU|PINK||0|||25.00|.00|.00|.00
```

Sample PRS Source Promotion Upload Record

```
7|PRS|A|11|1150414||OP|OPSORCS PROMOTION DESCRIPTION|0|0|||0|||
0.00||.00|||0|||0|0|||0|.00|0|||0|0|.00|.00|.00|||0|||.00|0|0|
0|.00|.00|.00|||0|.00|.00|||SOURCE7|0|||0|.00|.00|.00
```

Sample PRC Customer Promotion Upload Record

```
7|PRC|A|12|1150414||OP|OPCUSTC PROMOTION DESCRIPTION|0|0|||0|||
0.00||.00|||0|||0|0|||0|.00|0|||0|0|.00|.00|.00|||0|||.00|0|0|
0|.00|.00|.00|||0|.00|.00|||55|||0|.00|.00|.00
```

Sample PIC Item Category Promotion Upload Record

```
7|PIC|A|13|1150414||ITMCATP|PUITMC PROMO DESCRIPTION|0|0|||0|||
0.00||.00|||0|||0|0|||0|.00|0|||0|0|.00|.00|.00|||0|||.00|0|0|
0|.00|.00|.00|||0|.00|.00|||0|DFLT|||0|.00|.00|.00
```

Sample PIE Item Exclusion Promotion Upload Record

7	PIE	A	14	1150414		ITMCATP	PUITMX	PROMO	DESCRIPTION	0	0					0																	
0.00		.00				0				0				0		.00		.00		.00		.00			0			.00		0		0	
0		.00		.00		.00								0		.00		.00						DFLT		0		.00		.00		.00	

Sample Retail Integration Items Upload Data

Use the sample data below to create a Retail Integration Items upload file (RIIUPP or RIIUPP.TXT). See [Retail Integration Items](#) for a setup summary, and [RI Item Upload Process](#) for processing information.

- Sample 01 Item/SKU Item Upload Record
- Sample 03 Item Offer Upload Record
- Sample 04 SKU Offer Upload Record
- Sample 05 Item Price Upload Record
- Sample 06 SKU Price Upload Record
- Sample 07 Vendor Item Upload Record
- Sample 08 Item UPC Upload Record
- Sample 09 Item Coordinate Upload Record

Sample 01 Item/SKU Item Upload Record

```
6|1150304|110000|01|A|1|IT|3009|RED S      |U|0|0|Y|0|N|0| 0|
                                     |    |    |    |    |N| 0|
        |          |          |          |    |    |    |    |    |    |    |
Sleeve|                                     |N|N|N|0|  |    |0|11500|
0|CLT|   |0|  |   |0|0|   |EA|1234|0|0|0|   |    |   |0|0|Red Small|N|0|0|
29.99|0|0|0|0|0|0|0|0|0|N|0|N|100101|0|100101|   |           |
        |0|0|N|               |0|0|0|0|0|0|
                                 |N|   |0|0|N|0|   |           |N|0|
        |          |          |N|29.99|0|0|  |0|  |1|S010101|02|   |   |
        |   |   |   |   |   |0|   |   |0|0|N|0|0|0|0|0|N|0|0|0|0|N  |N|0|0|  |  |
                |                   |                   |N|N|0|  |  |
        |   |0|0|  |0|0|0|0|  |0|0|0|0|0|0|0|0|  |   |  |  |  |0|  |   |   |0|0|0|0|0|0|
0|0|  |   |0|0|0|0|0|0|0|0|  |0|                   |0|
                    |0|                                   |
                                |                           |0|0|0|0|0|
0|   |   |   |   |           |0|                   |   |   |
```

|Y|https://example.com/is/image/Fry/1001|https://
example.com/is/image/Fry/1001|https://example.com/is/image/Fry/1001|
https://example.com/is/image/Fry/1001|0

Sample 03 Item Offer Upload Record

```
7|1150421|84600|03|A|1|IT|R|TEST1| | |0|0|0|0|0.0|0|0|0|0|0|0|0|0.0000|
0|0|0|0.000|0|0|0.000|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|
0|0|0|0|0|0|0|0|0|0|0.0000|0.0|0|0|0|0|0.00|0|0|0|0|0.00|0|0|0|0|0|0|0|
0|0.000|0|0|0|0|0.000|0|0|0|0|0.0000|0.0000|0.0000|0.0000|0|0|0|0.00|
0.00|0|0|0|0|0|0|0|0|0|0.00|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|7|
16.99|15.00|Y|5.00|2|100|0.00|N|36.00|3.00|1.50|N|N|0.00|0|F|P| | | |N|
N|207| | |0|0.00|0.00|0|0|0|0.00|0|0.00|0.00|0.00|0.00|0.00|0|0|0|0|0|0|0|
```



```
0|0|0|0|0|0|0|0|0|0.00|0.00|0|0.00|0.00|0|0|0|0|0|0.00|0.00|0|0.00|0.00|0|0|
0|0|0|0|0|0|0|0|0|0.0000|0.000|0|0|0|0|0|0|0|0|0|0|0|0|||0
```

Sample 04 SKU Offer Upload Record

```

7|1150421|84600|04|A|1|IT|RITEST2|AQUA LRGE BABY||0|0|0|0|0.0|0|0|0|0|0|0|
0|0|0.0000|0|0|0|0.000|0|0|0.000|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|
0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0.0000|0.0|0|0|0|0|0|0.00|0|0|0|0|0.00|0|
0|0|0|0|0|0|0|0|0.000|0|0|0|0|0.000|0|0|0|0|0.0000|0.0000|0.0000|0.0000|
0|0|0|0.00|0.00|0|0|0|0|0|0|0|0|0|0.00|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|
0|0|0|0|0.00|0.00|0|0.00|0|0|0.00|0|0.00|0.00|0.00|0|0|0.00|0|0|0|0|0|0|
0|0|0|0|0|0|0|0|7|0.00|0.00|N|0|0|0.00|Y|0.00|0.00|0.00|0.00|0.00|0|N|
N|||N|N|0|MO||0|0|0|0.00|0.00|0|0.00|0.00|0|0|0|0|0.00|0.00|0|0.00|
0.00|0|0|0|0|0|0|0|0|0|0|0.0000|0.000|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|

```

Sample 05 Item Price Upload Record

[illegible]

Sample 06 SKU Price Upload Record

```

7|1150421|84600|06|A|1|IT|RITEST2|AQUA LRGE BABY||0|0|0|0|0.0|0|0|0|0|0|
0|0|0.0000|0|0|0|0.000|0|0|0.000|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|
0|0|0|0|0|0|0|0|0|0|0|0|0|0|0.0000|0.0|0|0|0|0|0.00|0|0|0|0|0.00|0|
0|0|0|0|0|0|0|0.000|0|0|0|0|0.000|0|0|0|0|0.0000|0.0000|0.0000|0.0000|
0|0|0|0.00|0.00|0|0|0|0|0|0|0|0|0.00|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|
0|0|0|0|0.00|0.00|0|0.00|0|0|0.00|0|0.00|0.00|0.00|0|0|0.00|0|0|0|0|0|0|
0|0|0|0|0|0|0|0|0.00|0.00|0|0|0|0.00|0|0.00|0.00|0.00|0.00|0.00|0|0|0|
0|0|0|0|0|0|0|0|0|0|0.00|0.00|0|0.00|0.00|0|7|1150401|1|0.00|45.00|0|
0.00|0.00||0|0|0|0|0|0|0|0|0|0.0000|0.000|0|0|0|0|0|0|0|0|0|0|0|0|0|0|
0

```

Sample 07 Vendor Item Upload Record

```

7|1150421|84600|07|A|1|IT|R|TEST2|||0|0|0|0|0.0|0|0|0|0|0|0|0|0|0.0000|0|
0|0|0.000|0|0|0.000|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|
0|0|0|0|0|0|0|0|0|0.0000|0.0|0|0|0|0|0.00|0|0|0|0|0.00|0|0|0|0|0|0|0|0|0|
0.000|0|0|0|0|0.000|0|0|0|0|0|0.0000|0.0000|0.0000|0.0000|0|0|0|0|0.00|
0.00|0|0|0|0|0|0|0|0|0|0.00|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|
0.00|0.00|0|0|0.00|0|0|0.00|0|0.00|0.00|0.00|0|0|0|0.00|0|0|0|0|0|0|0|0|0|0|
0|0|0|0|0|0.00|0.00|0|0|0|0.00|0|0.00|0.00|0.00|0.00|0.00|0|0|0|0|0|0|0|0|
0|0|0|0|0|0|0|0.00|0.00|0|0.00|0.00|0|0|0|0|0|0.00|0.00|0|0.00|0.00|0|0|7|
7RiITEM1Vi|10|7ITEM VENDOR ITEM|2|VENDOR ITEM MESSAGE 1|VENDOR ITEM
MESSAGE 2|VENDOR ITEM MESSAGE 3|10|10.0000|1.350|10|45|10||0|0|0|0|0|
0|0|0|||0

```

Sample 08 Item UPC Upload Record

```
7|1150421|84600|08|A|1|IT|R|TEST2|||0|0|0|0|0.0|0|0|0|0|0|0|0|0|0.0000|0|
0|0|0.000|0|0|0.000|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|
0|0|0|0|0|0|0|0|0|0.0000|0.0|0|0|0|0|0.00|0|0|0|0.00|0|0|0|0|0|0|0|0|0|0|
```

```

0.000|0|0|0|0|0|0.000|0|0|0|0|0|0.0000|0.0000|0.0000|0.0000|0|0|0|0|0.00|
0.00|0|0|0|0|0|0|0|0|0|0|0.00|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|0|
0.00|0.00|0|0|0.00|0|0|0.00|0|0.00|0.00|0.00|0|0|0.00|0|0|0|0|0|0|0|0|0|0|0|
0|0|0|0|0|0.00|0.00|0|0|0|0.00|0|0.00|0.00|0.00|0.00|0.00|0|0|0|0|0|0|0|0|0|
0|0|0|0|0|0|0.00|0.00|0|0.00|0.00|0|0|0|0|0.00|0.00|0|0.00|0.00|0.00|0|0|0|
0|0|0|0|0|0|0|0.0000|0.000|0|0|0|0|0|E8|65656565|7|0|0|0|0|0|0|0|0|0|0|0|

```

Sample 09 Item Coordinate Upload Record

[illegible]

Sample Sales Associates Upload Data

Use the sample data below to create a Sales Associates upload file. See [Sales Associates](#) for a setup summary, and [Salesman Associate Upload](#) for processing information.

555555SALESMAN ASSOCIATE UPLOAD NAMENHOMESTORE
SalesmanAssociateEmail@email.com

Sample Set Components Upload Data

Use the sample data below to create a Set Components upload file. See [Importing Set Components \(WCUP\)](#) for processing information.

- Sample Type S: Set and Set Detail Upload Record
- Sample Type VG: Variable Set and Variable Set Group Upload Record
- Sample Type VI: Variable Set Detail Upload Record

Sample Type S: Set and Set Detail Upload Record

```
7|S|SET|||SETCOMP1|||1|50.00|1|0|0|0|
```

Sample Type VG: Variable Set and Variable Set Group Upload Record

7	VG	VARIABLE			VARIABLECMP1			0	0	0	0	1	VARIABLE	GROUP	1	2

Sample Type VI: Variable Set Detail Upload Record

```
7|VI|VARIABLE|||VARIABLECMP2|||0|0|0|0|1|0|
```

Sample Source Codes Upload Data

Use the sample data below to create a Source Codes upload file. See [Source Codes](#) for a setup summary, and [Generating Source Codes Using the Source Upload Table \(WSRW\)](#) for processing information.

```
7|SOURCECD7|C|$O|H|D|K|SOURCECD7 SOURCE CODE DESCRIPT|500.00|.00|.00|
CD|5.00|DR|N|12.00|5.00|25.00|5.00|1|10000|1150401|5000|7000|POP UP
WINDOW MESSAGE 1          |POP UP WINDOW MESSAGE 2          |POP UP WINDOW
MESSAGE 3          |POP UP WINDOW MESSAGE 4          |12345|1234567|12.00|
12345|123|Y|N|Y|12.00|12.00|150.00|55.00|ALPHANUMERIC 30
```

```
POSITIONSUSER1|ALPHANUMERIC 30 POSITIONSUSER2|ALPHANUMERIC 30
POSITIONSUSER3|ALPHANUMERIC 30 POSITIONSUSER4|ALPHANUMERIC 30
POSITIONSUSER5|ALPHANUMERIC 30 POSITIONSUSER6|N|N|07|      |007|01|
01|123|RCCD|LSTSOURCE|FPOCD|N|CAT|CL|1150601|  |      |123.00|N|N|
```

Sample Stores Upload Data

Use the sample data below to create a Stores upload file. See [Stores](#) for a setup summary, and [Store Upload](#) for processing information.

```
STORE#777 THIS IS STORE#777 NAME/DESCRIPTION YSTORE#777 STREET
ADDRESS LINE 1 STORE#777 STREET ADDRESS LINE 2 STORE#777 STREET
ADDRESS LINE 3 STORE#777 STREET ADDRESS LINE 4CITY
MA01468 USATELEPHONENUMBR
```

Sample USPS Zip Codes Upload Data

Use the sample data below to create a USPS Zip Codes upload file. See [USPS Zip Codes](#) for a setup summary, and [Load USPS Zip Code File \(LZPS\)](#) for processing information.

```
D00501V13916UHOLTSVILLE PYV13916HOLTSVILLE NA
353910NY103SUFFOLK
D00544V13916UHOLTSVILLE
```

Sample Vendors Upload Data

Use the sample data below to create a Vendors Upload file (VNDUPL). See [Vendors](#) for a setup summary, and [Working with Vendor Upload \(LVUP\)](#) for processing information.

```
007|7|A|EXAMPLE VENDOR |1234 SAMPLE STREET
|SECOND ADDRESS LINE |THIRD ADDRESS LINE
|FOURTH ADDRESS LINE |WESTBOROUGH
|MA|01581 |US |JOHN SMITH |
5085550100| |0|ROBERT JONES |1234 REMIT SAMPLE ST
|SECOND ADDRESS LINE |THIRD ADDRESS LINE
|FOURTH ADDRESS LINE |SPRINGFIELD
|MA|01119 |US |Y|N|Y|P|0|0|N|N|N|N|N |
0|.00|.00|.00| |0| |S| |V|
|VENDOR@EXAMPLE.COM
|REMIT@EXAMPLE.COM
|USR1 |USR2 |USR3 |
|Y
```

Setting Up Authorization Services

Topics in this part: The following topics describe the functions available to define the payment authorization services that your company uses.

- [Reprocess Authorizations Screen \(RPAA\)](#)
- [Reprocess Drop Ship Authorizations Screen \(RPDS\)](#)
- [Working with Required Responses \(WREQ\)](#)
- [Reset Authorizations \(RSAA\)](#) describes how to reset records in the Credit Card Authorization Transaction table from a *SENT status to a *RDY status so that they can be resent to the authorization service.

- [Defining Authorization Services \(WASV\)](#) shows you how to define the authorization services that your company uses.
- [Defining Authorization Service Countries](#) shows you how to cross-reference your country codes to the country codes used by the account provider. You can also indicate whether the account provider performs address verification for the country.
- [Defining Vendor Paytype Codes](#) shows you how to cross-reference your payment codes to the payment codes used by the account provider.
- [Defining Vendor Response Codes](#) shows you how to define the codes your account provider uses to identify whether a credit card is approved or declined, and how to have the system place orders on hold based upon the vendor response code.
- [Defining Merchant ID Overrides](#) describes how to set up merchant ID overrides for different entities within your company.
- [Defining Authorization Service Currencies](#) describes how to set up cross references for your company's currency codes and the codes used by a account provider.
- [Performing Online Credit Card Authorizations](#) provides an overview on online credit card authorization and required setup.
- [Performing Batch Authorization \(SATH\)](#) describes how to send credit cards up for batch authorization by the associated ship via.
- [Printing the Online Credit Card Authorization List \(PATL\)](#) describes how to print the Online Authorization Listing.

Defining Authorization Services (WASV)

Purpose: Use the Work with Authorization Services menu option to:

- define the account providers that you use, such as:
 - Authorization services, to authorize charges against a credit card or stored value card.
 - Authorization/Deposit services, to authorize card charges and receive deposit amounts.
 - Deposit services, to provide settlement for card payments.
- identify the type of service the account provider performs
- define the parameters that identify your company to the account provider
- define the information necessary to connect, transmit, and receive data to and from the service, such as:
 - country codes
 - valid pay types
 - response codes (vendor responses, AVS responses, and CID responses)
 - currency codes
 - merchant IDs for individual entities within your company
 - whether the order originated as an internet order

Some of the information required to establish a account provider service provider on your system must be acquired from the account provider. For example, each account provider will assign you a unique merchant id and password.

You can use the same account provider service provider to process your authorizations and deposits, or you can use one service for authorizations and another for deposits.

! Important:

You would use Work with Authorization Services in Classic View to create and manage payment processing for Customer Engagement Stored Value Card, PayPal and External Payment Service Stored Value Cards and Credit Cards.

You cannot create, change, or delete an authorization service that uses EFTConnect through the Work with Authorization Services option in Classic View, instead, use the Payment Configurations option in Modern View to create and manage any payment processing through EFTConnect. Once the merchant account is created, configure additional settings for the EFTConnect authorization service within Work with Authorization Services such as Response Code hold reasons or country and currency mappings.

In this topic:

- [Deferred/Installment Pay Plans](#)
- [Identifying Internet Orders](#)
- [Work with Authorization Services Screen](#)
- [First Create Authorization Services Screen](#)
- [Second Create Authorization Service Screen](#)
- [Work with External Authorization Service Screen](#)

Deferred/Installment Pay Plans

Deferred or installment pay plans allow you to process deposits against orders at various intervals after you bill the order shipment. For example, you could offer “no payment for 60 days” or “four easy payments” to your customers.

In order to set up deferred or installment pay plans, you must have the [Deferred and Installment Billing \(F51\)](#) system control value must be selected. See [Deferred/Installment Billing Overview](#) for more information on deferred and installment pay plans and how to set them up in Order Administration.

Identifying Internet Orders

An internet order is determined in one of two ways:

- If using the [E-Commerce Interface](#) the system loads an I in the Internet field on the order header when the order is created in Order Administration.
- An order is considered an internet order if the order type on the order matches the [E-Commerce Order Type \(G42\)](#) system control value.
- Mail = Mail order.
- Phone = Telephone order.
- Internet = Web order.

To determine where the order originated, the system:

- looks at the value in the Internet order field in the Order Header table. If this field is set to I, the order is a web order.

- determines if the order type for the order matches the E-Commerce Order Type (G42) system control value. If the order type matches, the order is a web order.
- looks at the Forecasting order category field in the Order Type table. If this value is 1, the order is a mail order. If this value is 2, the order is a phone order.

Work with Authorization Services Screen

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

You can create only PayPal (PPL), Customer Engagement Stored Value Card (RLT) and External Payment Credit Card and Stored Value Card records through this screen. Use the Payment Configurations option in Modern View to create EFTConnect merchant accounts. Details about the EFTConnect merchant accounts will be available for display only.

Field	Description
Code	The code to identify the account provider. Enter a full or partial code and select OK to display service codes in alphanumeric order, starting with your entry. Alphanumeric, 3 positions; optional.
Application	The type of activity performed by the account provider. Valid values are: • Auth/Deposit = The account provider authorizes card charges and deposits dollar amounts billed to cards • Authorization = The account provider only authorizes card charges. • Deposit = The account provider only deposits dollar amounts billed to cards. Optional.
Description	The name of the account provider. Alphanumeric, 30 positions; optional.
Merchant	The account number assigned by the account provider to identify transmissions to/from your company. This is the default ID number; you can also specify separate ID numbers for each entity in your company, and/or to use for orders using deferred or installment billing. Alphanumeric, 20 positions; optional.

Screen Option	Procedure
Change an authorization service record	Select Change for a service to advance to the Change Authorization Services Screen. At this screen you can change any information except the Service code. See the First Create Authorization Services Screen for field descriptions. Important: You cannot use this option to change an existing authorization service using EFTConnect. Use the Payment Configurations option in Modern View instead.
Delete an authorization service record	Select Delete for a service to delete it. Important: You cannot use this option to delete an existing authorization service using EFTConnect. Use the Payment Configurations option in Modern View instead.

Screen Option	Procedure
Display an authorization service record	Select Display for a service to advance to the Display Authorization Services Screen. You cannot change any information at this screen. See the First Create Authorization Services Screen for field descriptions. Settings configured through the Payment Configurations options in Modern View for EFTConnect will be displayed here.
Work with country codes	Select Country for a service to add, change or delete the country codes recognized by the account provider; see Defining Authorization Service Countries .
Work with vendor paytype codes	Select Paytypes for a service to add, change, delete or display the pay type codes recognized by the authorization service. See Defining Vendor Paytype Codes .
Work with vendor responses	Select Responses for a service to add, change, display or delete the response codes you receive from the service and the actions to take for each. See Defining Vendor Response Codes .
Work with merchant ID overrides based on entity	Select Merchant ID Override for a service to add, change, or delete merchant ID overrides by entity. See Defining Merchant ID Overrides .
Work with currency codes	Select Currency for a service to add, change, or delete cross-references between the currency codes used in your company and by the authorization service. See Defining Authorization Service Currencies .
Work with external authorization service settings	Select External Service to advance to the Work with External Authorization Service Screen . External Authorization Service Access (B25) authority is required.
Create an authorization service	Select Create to advance to the First Create Authorization Services Screen . Important: You cannot use this option to create an EFTConnect. Use the Payment Configurations option in Modern View instead.

First Create Authorization Services Screen

Purpose: Use this screen to define an account provider on your system. The Authorization Service record contains information that identifies your company to the account provider and the parameters that you must include in the transmission to the account provider.

Each account provider requires its own information. Not all fields are applicable for each service.

Important:

You cannot use this screen to create a new authorization service using EFTConnect. Use the Payment Configurations option in Modern View instead.

How to display this screen: Select Create at the [Work with Authorization Services Screen](#).

Field	Description
Service Code	The code to identify the account provider. Point-to-Point communication: If you are using point-to-point communication, the Service code must be a specific value for the integration: - PayPal: To use the PayPal Integration, enter PPL. - Oracle Retail Customer Engagement integration: To use the Customer Engagement Stored Value Card Integration, enter RLT. EFTConnect: Generated by the system when a merchant account is created through the Payment Configuration option in Modern View. The code is created sequentially always starting with an 'E' (i.e. E01, E02, E03). External Payment Service: Enter a unique code for the service that is different from the other system required codes. Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.
Application	The type of activity performed by the account provider. Valid values are: - Auth/Deposit = The account provider authorizes card charges and deposits dollar amounts billed to the cards. - Authorization = The account provider only authorizes card charges. - Deposit = The account provider only deposits dollar amounts billed to cards. Note: PayPal should have the Application type set to Auth/Deposit. Required.
Merchant ID	The account number assigned by the account provider to identify transmissions to/from your company. This ID is a default. You can also identify merchant IDs to use for depositing deferred or installment pay plans (as opposed to regular deposits) below. Similarly, you can set up overrides for different entities in your company, including deferred or installment overrides. See Defining Merchant ID Overrides. Note: You can enter upper and lower case letters in this field. Alphanumeric, 20 positions; optional.
Charge description	A description that identifies your company's product line or the type of service performed. Alphanumeric, 20 positions; optional.
Deferred merchant ID	The account number assigned by the service to identify transmission of deferred pay plan transactions for deposit. See Deferred/Installment Billing Overview for more information on deferred and installment billing, and see Processing Auto Deposits (SDEP) for more information on processing deposits. You can also set up overrides for different entities in your company, including deferred or installment overrides. See Defining Merchant ID Overrides. Alphanumeric, 20 positions; optional.
Installment merchant ID	The account number assigned by the service to identify transmission of installment pay plan transactions for deposit. See Deferred/Installment Billing Overview, and see Processing Auto Deposits (SDEP). You can also set up overrides for different entities in your company, including deferred or installment overrides. See Defining Merchant ID Overrides. Alphanumeric, 20 positions; optional. The account provider assigns values to the following fields:

Field	Description
Signon	A code required to sign on to the account provider. Case-sensitive. Alphanumeric, 10 positions; optional.
Receiving code	A code that identifies your company to the account provider. Alphanumeric, 10 positions; optional.
Password	A password required by the account provider. Case-sensitive. Alphanumeric, 10 positions; optional.
Start up information	Startup text that identifies your company to the account provider. Alphanumeric, 10 positions; optional.
Presenter's ID Auth / Deposit	A code required to sign on to the account provider. Separate fields allow you to define a presenter's ID for both batch authorization and deposit transactions; if you use the same port number for both batch authorization and deposit transactions, define the presenter's ID in the first field. Alphanumeric, 10 positions; optional.
PID password Auth / Deposit	A password required to sign on to the account provider. Separate fields allow you to define a PID password for both batch authorization and deposit transactions; if you use the same port number for both batch authorization and deposit transactions, define the PID password in the first field. Alphanumeric, 10 positions; optional.
Submitter's ID Auth / Deposit	A code required to sign on to the account provider. Separate fields allow you to define a submitter's ID for both batch authorization and deposit transactions; if you use the same port number for both batch authorization and deposit transactions, define the submitter's ID in the first field. Alphanumeric, 10 positions; optional.
SID password Auth / Deposit	A password required to sign on to the account provider. Separate fields allow you to define a SID password for both batch authorization and deposit transactions; if you use the same port number for both batch authorization and deposit transactions, define the SID password in the first field. Alphanumeric, 10 positions; optional.
Sub code	A code required to sign on to the account provider. Alphanumeric, 10 positions; optional.
Exclude from FPO (Exclude from flexible payment option)	Indicates whether to exclude orders associated with this account provider from a deferred or installment pay plan. If an order includes any pay type whose authorization service has this field selected, the order is not eligible for a pay plan. Valid values are: - Selected = exclude from pay plan - Unselected = do not exclude from pay plan See Deferred/Installment Billing Overview for information on how the system determines whether an order is eligible for a pay plan in order entry.

Field	Description
Void auth at deposit	Defines whether any unused portion of an authorization should be voided at deposit time for: • A credit card pay type, or • A stored value card, when the External Payment Service is used. Valid values are: • Selected = The system voids any unused portion of an authorization for a credit card pay type at deposit time. Order Administration will need to obtain an additional authorization for any subsequent deposits for the order. • Unselected = The system retains any unused portion of an authorization for a credit card pay type at deposit time. See Void Unused Authorization After Initial Deposit for processing details. Important: Your end account provider must support split shipments for you to set this flag to N. Stored value card pay types when not using the External Payment Service: The setting of the Retain Unused Stored Value Card Authorization After Deposit (J21) system control value defines whether the system automatically voids a partially deposited stored value card authorization when the External Payment Service is not in use. See Stored Value Card Deposits for processing details.
Send reversal	Defines whether the account provider supports authorization reversals for credit card and stored value card payments. Valid values are: • Selected = The account provider supports authorization reversal processing for credit card and stored value card pay types. The REVERSE (Send Reversals for Expired Authorizations) periodic function processes all open Authorization History records for pay types associated to this service that are eligible for authorization reversal. • Unselected = The account provider does not support authorization reversal processing for credit card or stored value card pay types. The REVERSE periodic function does not process eligible authorization reversals for pay types associated to this service. Regardless of the setting of this field, you can still perform stored value card authorization reversals when the card is deactivated; see Stored Value Card Authorization Reversal.
Supports Auth Resubmission	Indicates whether to resubmit failed authorization and deposit requests for credit cards through the External Payment Service. When the request is for authorization and deposit of a failed deposit request: CyberSource: The subsequentAuthReason in the authorization and deposit request is set to 1 if the Supports Auth Resubmission flag is selected; otherwise it is set to 3. Note: If the credit card number changes since the initial deposit request, then the subsequentAuthReason is set to 3, since it is not considered a subsequent authorization and deposit request. External Payment Service: The subsequentAuthReason is set to RESUBMIT; otherwise, if the Supports Auth Resubmission flag is not selected, the subsequentAuthReason is set to REAUTH. Important: Select this flag only if your account provider supports merchant-initiated resubmission of failed deposits.

Second Create Authorization Service Screen

! Important:

You cannot use this screen to create or change and EFTConnect service. Use the Payment Configurations option in Modern View instead.

How to display this screen: Select OK at the [First Create Authorization Services Screen](#).

Field	Description
Media type	The method by which the data is transmitted to the account provider. Valid value is Communication. Optional.
Batch/Online	A code that indicates whether transactions are transmitted to/received from the account provider immediately (online) as each order is entered, or whether groups of transactions are transmitted to/received from the account provider at predefined times during the day (in batch). Valid values are: • Batch = Transactions are grouped and transmitted to/received from the account provider at predefined times throughout the day. • On-line = Transactions are transmitted to/received from the account provider immediately for each order. • On-line or Batch = Transactions are transmitted to/received from the account provider immediately if the order is eligible for online authorization. Any order that does not receive an authorization immediately is grouped and transmitted to/received from the account provider at predefined times. Optional.
Active production system	This field is ONLY used for PayPal. Indicates whether you are processing in a live environment (production) or in a testing environment. Valid values are: • Selected = Transactions are being processed in a live environment. • Unselected = Transactions are being processed in a testing environment.
Installment billing?	Indicates if the account provider supports installment billing of credit cards. Installment billing plans are typically established for high cost items. Note: This field is informational only and is not used to set up an installment pay plan in Order Administration. Valid values are: • Selected = The account provider supports installment billing. • Unselected = The account provider does not support installment billing.
Immediate response	Indicates whether a response from the account provider is received immediately for each authorization transaction. Valid values are: • Selected = Responses from the account provider are received immediately for each transaction. • Unselected = Responses from the account provider are not received immediately (delayed turnaround).

Field	Description
Immediate deposit	Indicates whether the account provider sends a detailed response to Order Administration. Valid values are: - Selected = The account provider does not send a detailed response to Order Administration; Order Administration marks the transaction as received and subsequently confirmed. - Unselected = The account provider sends a detailed response to Order Administration; Order Administration waits for the response based on the Wait time defined for the associated integration layer job.
Keep history information?	Indicates whether transactions sent to the account provider will be kept online. Typically, this feature is used in test environments. Valid values are: - Selected = Keep the transaction records on-line. - Unselected = Do not keep the transaction records on-line.
Selected for deposit	Indicates whether the account provider is included in the next deposit run. By default, all account providers are selected for deposit; however, you can remove a account provider from the next deposit run at the Select Auth Service for Deposit Screen in Processing Auto Deposits (SDEP). Once you submit the deposit run, the system reselects all account providers for the next deposit run. Valid values are: - Selected (default) = The system includes the account provider in the next deposit run. - Unselected = The system does not include the account provider in the next deposit run. This field displays as unselected only if you are reviewing this screen at the same time a deposit run is submitted that does not include this account provider. Display-only.
Address verification	Indicates whether you will be using the Address Verification Service provided by the account provider to verify the customer's address and credit card number. Valid values are: - Selected = Perform address verification - Unselected = Do not perform address verification
Decline days	The number of days to hold a declined credit card charge on the system before sending it for an authorization again. This field is not implemented. See Defining Vendor Response Codes for setup information. Numeric, 3 positions; optional.
Industry format code	A code that is assigned by the account provider to identify your company type. Use this field to enter your DBA number. Alphanumeric, 5 positions; optional.
Primary authorization service	The primary account provider that the account provider uses for its transmission setup. Orders sent to this account provider are redirected to the primary account provider defined in this field. If this field is left blank, the data created for this account provider will be used. Alphanumeric, 3 positions; optional.
Deposit phone #	The telephone number associated with the deposit account provider. Informational only. Numeric, 11 positions; optional.

Field	Description
Authorization phone #	The telephone number associated with the authorization account provider. Informational only. Numeric, 11 positions; optional.
Communication type	Indicates the method of communication used to transmit transactions between Order Administration and the account provider. The only valid value is Payment Link, in which the system sends transactions to the account provider using a point-to-point integration. You must define communication settings in Working with Customer Properties (PROP) . The system also uses the Activation and Authorization Reversal integration layer jobs to process stored value card triggers. Optional.
Response check frequency	Indicates the multiple to apply to the Response time to determine how long to wait for a response after a connection when you are using an external payment service. For example, if the Response check frequency is 6 and the Response time is 10,000, the system waits 60,000 milliseconds (60 seconds or 1 minute) for a response after connection. Note: If the total response interval is exceeded for an authorization record, the record goes into *RCVD status with a response type of SU, and is then removed from the Credit Card Authorization Transaction table (CCAT00). To avoid potential timeout issues, Oracle recommends that you set the Response Time high enough for the authorization service to prevent issues that could potentially occur if the authorization process times out while processing multiple authorizations for an order. Numeric, 3 positions; optional.
Test mode?	This field is used for both PayPal and EFTConnect. Indicates whether you are transmitting in test mode. Valid values are: - Selected = Test mode. The system inserts the word TEST in the transmission. - Unselected (default) = Live mode. For PayPal, if selected, the environment key is set to "sandbox" and if unselected, the environment key is set to "live". For EFTConnect, see Payment Configurations . The Environment field can be set to Test or Live.
Response time	Indicates the number of milliseconds to wait for a connection to the account provider when you are using an external payment service. For example, set this field to 10,000 milliseconds to wait 10 seconds for a connection. Numeric, 5 positions; optional.
Merchant division	Assigned by the authorization service. Numeric, 5 positions; optional.
Authorization service provider	This field is not implemented. Alphanumeric, 10 positions; optional.
API User name	The user name, provided by the account provider, used to establish a direct connection to the account provider. Alphanumeric, 64 positions; optional.
API Password	The password, provided by the account provider, used to establish a direct connection to the account provider. Alphanumeric, 64 positions; optional.

Field	Description
API Signature	The encrypted signature, provided by the account provider, used to establish a direct connection to the account provider. You can also define API credential information at the entity level using the Create Merchant ID by Entity Screen. Alphanumeric, 128 positions; optional.
Override Reconciliation Id	Indicates the value to pass as the reconciliationID in a debit deposit, credit deposit, or authorization and deposit request to EFTConnect. Available settings are: • blank (default) = Do not send the invoice number or the alternate order number as the reconciliation ID. • Invoice Number = Send the invoice number as the reconciliation ID. The invoice number is assigned at billing. • Alternate Order Number = Send the alternate order number, if it exists, as the reconciliationID. For an e-commerce order, the alternate order number is the order_number passed in the <i>Inbound Order XML Message (CWORDERIN)</i> message to identify the order in the originating system or on the web storefront. The alternate order number is labeled the Alt ord at the Display Order Properties Screen. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). If the reconciliationID in the request message does not specify an invoice number or alternate order number, then when using EFTConnect CyberSource, the reconciliationID is assigned as a reference number for the transaction, and passes it in the response message. If the e-commerce is configured as a reconciliation ID for deposits, the deposit could fail if the e-commerce ID is longer than allowed by the payment processor. See Alternate Order Number Prefix for Order Creation (M76) for more information. Note: • If the Alternate Order Number is passed as the reconciliationID, it must be alphanumeric. If the reconciliationID includes any special characters, depending on the rules or requirements of the back-end processor, CyberSource may ignore the ID provided in the request and assign its own reconciliationID, to be passed in the response. • Only the debit deposit, credit deposit, and authorization and deposit messages support sending the reconciliationID. CyberSource generates a reconciliationID during authorization, so as a result, there can be more than one reconciliationID associated with the deposit. • The supported size of the reconciliationID varies based on the credit card processor. You need to confirm that the credit card processor used supports the length and attributes of the invoice number or alternate order number. • It is possible that the reconciliationID from Order Administration may not be unique in CyberSource if, for example, you have multiple companies. • In the case of an authorization + deposit request, the reconciliationID is included in both the ccAuthService node as well as the ccCaptureService node. Otherwise, it is included only in the ccCaptureService node.

Instructions:

1. At the [First Create Authorization Services Screen](#), enter the [Service Code](#), [Application](#), [Merchant ID](#), [Charge description](#) and any other information required by the account provider.

2. Select OK to advance to the [Second Create Authorization Service Screen](#).
3. Continue entering all necessary information to set up the account provider on your system.

Work with External Authorization Service Screen

Purpose: The purpose of the external authorization service screen is to configure the communication to an external Payment Service Provider (PSP) for card-based payment processing when you want to create a direct integration as part of your implementation project.

Use EFTConnect to integrate with Account Providers, such as CyberSource and Adyen. See the Payment Configurations option in Modern View for more information.

If your payment service provider would like a published offering with Order Management Suite Cloud Service leveraging the EFTConnect OPI integration, submit an enhancement request to Oracle for next steps.

For more information: See the External Payment Service section of the *Order Administration Cloud Service Web Services Guide* on My Oracle Support for more information on this interface.

EFTConnect required: The EFTConnect Payment Form is required for adding or replacing an external service payment method through Modern View Order Entry, Order Edit, Customer Membership and Rejected Deposits. This Payment Form will collect the required payment card data, and EFTConnect will return a Form Token to Order Administration for subsequent authorizations, deposits and refunds with the external payment service. See the EFTConnect Custom Core Implementation Reference Paper on My Oracle Support for more information on this implementation.

Required settings before you begin: Before you use the External Payment Service, the following configuration is required for communicating to the EFTConnect Payment Form:

- **Properties:** Configure the following properties in Work with Admin Properties (CPRP):
 - **ELO_CONFIG_URL:** Used to establish a connection with EFTConnect.
 - **ELO_PAYMENT_URL:** Defines the URL to use for any transactional communication with EFTConnect Payment Form.
 - **ELO_THRESHOLD_TIME:** Used for logging purposes. Compares the elapsed time of the web service with the **ELO_THRESHOLD_TIME**. If the elapsed time exceeds the threshold, a message is logged.
 - **ELO_TIMEOUT:** Defines the number of milliseconds to wait before requests from Order Administration to EFTConnect time out.



Note:

All fields are required, with the exception of the External Service flag.

Field	Description
External Service	Select this field to have request messages generated for the External Payment Service.

Field	Description
External URL Prefix	The prefix that forms the beginning of the URL where messages are sent. Must begin with HTTPS. The message type defines the suffix that is appended to the prefix to create the entire URL. For example, for a credit card authorization request, the entire URL might be https://remote.auth.com:1234/authorization, where remote.auth.com is the remote server, 1234 is the port, and authorization identifies an authorization request. The following endpoints are supported: • balanceInquiry • authorization • reversal • getToken • generateGift • activateGift • rechargeGift • deposit • return Alphanumeric, 600 positions; required if the External Service flag is selected.
Message Version	Indicates which message version is used when integrating with an external payment service provider. Defaults to the latest version when creating a new service.
Authentication User	The user ID for authentication of the messages to the external service. Alphanumeric, 256 positions; required if the External Service flag is selected.
Authentication Password	The password for authentication of the messages to the external service. Must be at least 6 positions long, include both numbers and letters, include a special character, and cannot end with a number. Alphanumeric, 256 positions; required if the External Service flag is selected.

Defining Authorization Service Countries

Purpose: Each account provider that your company uses may assign its own country codes to the various credit card payment methods. These country codes may differ from the country codes your company uses.

The Authorization Service Country function is used to cross reference the country codes your company uses with the country codes the authorization and deposit service uses. By cross referencing the country codes:

- You can use your country codes when entering orders.
- The country code the account provider uses can be included in the Authorization and Deposit transactions that are transmitted to the account provider.
- When you create the country cross-reference, you can also indicate whether the account provider performs address verification for the country.

**Note:**

Use this option if you are sending transactions to the account provider using a point-to-point integration.

Authorization service country required for double-byte customer address: If the customer's address uses a double-byte language, such as Chinese, you need to set up an authorization service country record to support address verification.

In this topic:

- [Work with Authorization Service Country Screen](#)
- [Create Authorization Service Country Screen](#)

Work with Authorization Service Country Screen

Purpose: This screen displays the country cross references currently defined for the account provider. Use this screen to create, change, or delete the country cross reference information for an External Payment Service or EFTConnect account provider

The country codes your company uses are defined in the Country table; the country codes the account provider uses are provided by the account provider.

How to display this screen: At the [Work with Authorization Service Country Screen](#), select Country for the account provider.

Field	Description
Authorization service	The code and description of the account provider for which you are defining a country cross reference. Code: Alphanumeric, 3 positions; display-only. Description: Alphanumeric, 30 positions; display-only.
Country	A code you use to identify a country. Country codes are defined in and validated against the Country table; see Setting Up the Country Table (WCTY) . Alphanumeric, 3 positions; optional.
Authorization Service Country	The code the account provider uses to identify a country. Vendor country codes are provided by the account provider. Alphanumeric, 3 positions; optional.
AVS	Defines whether the account provider performs address verification for the country. N = The account provider does not perform address verification for the country. Y = The account provider performs address verification for the country. Alphanumeric, 1 position; display-only.

Option	Procedure
Create a country cross reference	Select Create to advance to the Create Authorization Service Country Screen .

Option	Procedure
Change a country cross reference	Select Change for the country cross reference to advance to the Change Authorization Service Country screen. At this screen you can change the Authorization service country and the Address verification setting. See the Create Authorization Service Country Screen for field descriptions.
Delete a country cross reference	Select Delete for the country cross reference to delete it.

Create Authorization Service Country Screen

Purpose: Use this screen to cross reference the country codes your company uses with the codes the account provider uses. For example, your company may use country code USA to identify the United States of America, whereas the account provider may use country code US.

The country codes your company uses are defined in the Country table; the country codes the account provider uses are provided by the account provider.

How to display this screen: Select Create at the [Work with Authorization Service Country Screen](#).

Field	Description
Authorization service	The code and description of the account provider for which you are defining a country cross reference. Code: Alphanumeric, 3 positions; display-only. Description: Alphanumeric, 30 positions; display-only.
Country	A code you use to identify a country. Country codes are defined in and validated against the Country table; see Setting Up the Country Table (WCTY). Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.
Authorization service country	The code the account provider uses to identify a country. Vendor country codes are provided by the account provider.
Address verification	Alphanumeric, 3 positions; required. Defines whether the account provider performs address verification for the country. Not used by EFTConnect. Unselected = The account provider does not perform address verification for the country. Selected = The account provider performs address verification for the country.

**Note:**

EFTConnect requires a 2-character ISO country code.

Defining Vendor Paytype Codes

Purpose: Each account provider that your company uses may assign its own paytype codes to the various credit card payment methods. These paytype codes may differ from the paytype codes your company uses. For example, the account provider may use paytype code 01 to represent payment by Visa, whereas, your company may use paytype code 04 to identify payment by Visa.

The Vendor Paytype Codes function is used to cross reference the paytype codes your company uses with the paytype codes the authorization service uses. By cross referencing the paytype codes:

- you can use your paytype codes when entering orders
- the paytype code the account provider uses can be included in the Authorization and Deposit transactions that are transmitted to the account provider.

In this topic:

- [Work with Paytype Cross Reference Screen](#)
- [Create CC Paytype Cross Reference Screen](#)

Work with Paytype Cross Reference Screen

Purpose: This screen displays the pay type cross references currently defined for the account provider. Use this screen to create, change, delete, or display the pay type cross reference information.

The pay type codes your company uses are defined in the Pay Type table; the pay type codes the account provider uses are provided by the account provider.

How to display this screen: At the [Work with Authorization Services Screen](#), select Paytypes for the account provider.

Field	Description
Pay type	A code you use to identify a method of payment on an order. Pay type codes are defined in the Pay Type table; see Working with Pay Types (WPAY) . Numeric, 2 positions; optional.
Vendor pay code	The code the authorization service uses to identify a method of payment. Vendor pay type codes are provided by the account provider. Alphanumeric, 5 positions; optional.
Authorization Merchant #	The merchant number to use when sending authorization requests for this pay type code to the account provider for approval. The merchant number is assigned to your company by the account provider. Alphanumeric, 10 positions; optional.
Deposit merchant # (Deposit merchant number)	The merchant number to use when sending deposit requests for this pay type code to the account provider for settlement. The merchant number is assigned to your company by the account provider. Alphanumeric, 10 positions; optional.

Option	Procedure
Create a paytype cross reference	Select Create to advance to the Create CC Paytype Cross Reference Screen for the account provider.
Change a paytype cross reference	Select Change for the pay type cross reference you want to change to advance to the Change Paytype Cross Reference Screen. At this screen you can change any information except the Authorization service and the Pay type code. See the Create CC Paytype Cross Reference Screen for field descriptions.
Delete a paytype cross reference	Select Delete for the pay type cross reference you want to delete.
Display a paytype cross reference	Select Display for the pay type cross reference you want to display to advance to the Display CC Paytype Cross Reference Screen. You cannot change any information at this screen. See the Create CC Paytype Cross Reference Screen for field descriptions.

Create CC Paytype Cross Reference Screen

Purpose: Use this screen to cross reference the pay type codes your company uses with the codes the account provider uses. For example, your company may use pay type code 4 to identify payment by Visa, whereas the account provider may use pay type code 1.

The pay type codes your company uses are defined in the Pay Type table; the pay type codes the account provider uses are provided by the account provider.

How to display this screen: Select Create at the [Work with Paytype Cross Reference Screen](#).

Field	Description
Pay type	The code you use to identify a method of payment on an order. Pay type codes are defined in the Pay Type table; see Working with Pay Types (WPAY) . Numeric, 2 positions. Create screen: required. Change screen: display-only.
Vendor paytype/code	The code the account provider uses to identify a method of payment. Vendor pay type codes are provided by the account provider. Alphanumeric, 5 positions; required.
Authorization merchant #	The merchant number to use when sending authorization requests for this pay type code to the account provider for approval. The merchant number is assigned to your company by the account provider. Alphanumeric, 10 positions; optional.
Deposit merchant #	The merchant number to use when sending deposit requests for this pay type code to the account provider for settlement. The merchant number is assigned to your company by the account provider. Alphanumeric, 10 positions; optional.

Instructions:

1. Enter the pay type code your company uses to identify the payment method in the [Pay type](#) field.

2. Enter the corresponding pay type code the account provider uses to identify the payment method in the [Vendor pay code](#).
3. Optionally, enter the authorization and deposit merchant numbers assigned to your company by the account provider in the [Authorization Merchant #](#) and the [Deposit merchant # \(Deposit merchant number\)](#) fields.
4. Your entries are cleared from the screen and a message similar to the following displays: CC Vendor Paytype Cross Reference (NAB - 5) created.

Defining Vendor Response Codes

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

You should define each code for each account provider you work with.

The system allows you to set up the following instructions for vendor response codes:

- how many times to attempt authorization for this response
- whether to put the order on hold and, if so, for how long
- whether to flag the order for cancellation

EFTConnect generic response code: EFTConnect generic message response and AVS reason codes are automatically created when setting up a new EFTConnect Merchant Account through the Payment Configurations option in Modern View. Additional details, such as hold codes and messaging, will need to be configured. See [EFTConnect Response Code Table](#) for a full list.

Online credit card authorizations: If you are sending store value card or card tokens for authorization during order entry and edit (the [On-line Authorizations \(B89\)](#) system control value is selected), the system displays additional fields where you can enter a message indicating whether the card was approved or declined and if any action should be taken, such as asking the customer to repeat the card number or requesting a different card for authorization. If you define a message, the system displays the message when a response is received from the account provider. This window displays the pop up window messages you defined for this vendor response. See [Performing Online Credit Card Authorizations](#) for an overview on online authorizations and the required setup.

Credit card decline email: If you specify a program in the [Credit Card Decline Email Program \(K53\)](#) system control value, the batch authorization process in pick slip generation generates an email to the customer when an order is placed on hold due to a credit card decline. See that system control value for more information.

In this topic:

- [Entity Setup](#)
- [Vendor Response Setup Examples](#)
- [About Deposits](#)
- [Work with Vendor Response Screen](#)
 - [Create Vendor Response Screen](#)
- [Select Entity for Vendor Response Details Screen](#)
- [Work with Ship Via \\$ Limit to Hold Screen](#)
 - [Create Ship Via \\$ Limit to Hold Screen](#)

- [Work with Pay Type \\$ Limit to Force Authorization Screen](#)
 - [Create Pay Type \\$ Limit to Force Authorization Screen](#)
- [Work with Item Class \\$ Limit to Hold Screen](#)
- [Create Item Class \\$ Limit to Hold Screen](#)
- [Change Item Class \\$ Limit to Hold Screen](#)
- [Display Item Class \\$ Limit to Hold Screen](#)
- [Work with Postal Code \\$ Limit to Hold Screen](#)
- [Create Postal Code \\$ Limit to Hold Screen](#)
- [Change Postal Code \\$ Limit to Hold Screen](#)
- [Display Postal Code \\$ Limit to Hold Screen](#)

Defining Vendor Response Codes

Entity Setup

Additionally, you can set up the following instructions for a vendor response code for each entity in your company:

- Whether a dollar limit is applied to the ship via on the order. If the authorization amount is less than the ship via dollar limit, the system releases the order from any AVS hold. If the authorization amount is greater than the ship via dollar limit, the system places the order on hold using the hold reason defined for the ship via dollar limit. See [Entity ship via dollar limits](#).
- Whether a dollar limit to force an authorization is applied to a specific pay type. See [Entity pay type dollar limits](#).
- Whether a dollar limit is applied to the item class associated with an item on the order that requires authorization. If the authorization amount is less than the item class dollar limit, the system releases the order from any AVS hold. If the authorization is greater than the item class dollar limit, the system places the order on hold using the hold reason defined for the item class dollar limit. See [Entity item class dollar limits](#).
- Whether a dollar limit is applied to the postal code for the bill to or sold to customer on the order. If the authorization amount is less than the postal code dollar limit, the system releases the order from any AVS hold. If the authorization amount is greater than the postal code dollar limit, the system places the order on hold using the hold reason defined for the postal code dollar limit. See [Entity postal code dollar limits](#).

Online authorization: If you are performing online authorization, the system does not evaluate the order for entity pay type dollar limit or entity ship via dollar limit; however, the system will evaluate the order for item class dollar limit and postal code dollar limit.

Entity dollar limit hierarchy: The system uses the following hierarchy when evaluating whether the order meets an entity dollar limit.

1. Evaluate the order for [Entity pay type dollar limits](#).
2. If the order does not qualify for entity pay type dollar limits, evaluate the order for [Entity ship via dollar limits](#).
3. If the order does not qualify for entity ship via dollar limits, evaluate the order for [Entity item class dollar limits](#).
4. If the order does not qualify for entity item class dollar limits, evaluate the order for [Entity postal code dollar limits](#).

If an order qualifies for more than one of the entity dollar limits, the system holds/releases the order using the last entity dollar limit that qualifies. For example, if the order qualifies for both entity ship via dollar limit and entity postal code dollar limit, the system holds or releases the order based on the entity postal code dollar limit setup.

Entity ship via dollar limits

You can set up a ship via dollar limit for an AVS response for each entity in your company. You can use the ship via dollar limit to reduce the amount of fraud. For example, a credit card may receive an AVS response of “all address matching,” but you may want to perform an additional check against the ship via assigned to the order and the dollar amount that requires authorization.

- If the authorization amount is less than the ship via dollar limit, the system releases the order from any AVS hold.
- If the authorization amount is greater than the ship via dollar limit and the sold to customer and ship to customer are different, the system places the order on hold using the hold reason defined for the ship via dollar limit.

The system checks the following information to determine if an order should go on hold due to a ship via dollar limit:

- the account provider code
- the AVS response code received from the account provider
- the Entity associated with the order
- the Ship via code on the order header
- the \$ limit to hold on the order
- the sold to customer and ship to customer are different
- The [Use Credit Card Vendor Response Entity Ship Via Dollar Limits \(F94\)](#) system control value is selected. If this system control value is not selected, the system does not perform an edit against the ship via dollar limit for an AVS response to determine if an order should go on hold.

The system does not evaluate the order for ship via dollar limit if:

- The order does not pass authorization, regardless of whether the ship to customer is different than the sold to customer.
- You are performing online authorization.

Entity ship via dollar limit summary:

AVS response	Entity \$ limit	Auth amount less than entity \$ limit	Auth amount greater than or equal to entity \$ limit
hold reason	no hold reason	The system releases the order from AVS hold. Order transaction history message: AVS HLD Release - Entity Via \$Limit.	The system places the order on hold, using the hold reason defined for the AVS response. Order transaction history message: SYS HLD - Declined Credit Card.

AVS response	Entity \$ limit	Auth amount less than entity \$ limit	Auth amount greater than or equal to entity \$ limit
no hold reason	hold reason	The system does not place the order on hold.	The system places the order on hold, using the hold reason defined for the entity ship via dollar limit. Order transaction history message: SYS HLD - Declined Credit Card.
no hold reason	no hold reason	The system does not place the order on hold.	The system does not place the order on hold.
hold reason	hold reason	The system releases the order from AVS hold. Order transaction history message: AVS HLD Release - Entity Via \$Limit.	The system places the order on hold, using the hold reason defined for the entity ship via dollar limit. Order transaction history message: SYS HLD - Declined Credit Card.

Ship via dollar limit example: The following is an example of how to set up a ship via dollar limit for an AVS response code.

AVS Response	Description	Hold Reason Code
I3	All Address Matching	None

The following is an example of how to set up ship via dollar limit hold values:

AVS Response	Entity	Ship Via	\$ Limit	Hold Reason Code
I3	555	1	\$50.00	J3
I3	555	2	\$75.00	J4
I3	555	3	\$150.00	J5

Using the example, if an order passed AVS because it received an AVS response of I3, all address matching, the system would then perform an edit against the ship via dollar limit defined for the response.

If a ship via dollar limit was defined for the entity associated with the order, the ship via defined on the order, and the dollar amount on the order that required authorization was greater than the dollar limit defined for the AVS response, the order would then be placed on hold, using the hold reason code defined for the ship via dollar limit.

Using the example, the system would assign the hold reason code J3 to an order if the order was associated with entity 555, ship via code 1, and the dollar amount that required authorization was greater than \$50.00.

Entity pay type dollar limits

You can set up a pay type dollar limit for a vendor response for each entity in your company. You can use the pay type dollar limit to force authorizations that have been declined.

Example: If a credit card received a vendor response of "credit card exceeds limit", you may want to force the authorization through anyway if the dollar amount that requires authorization is less than \$50.00.

If you set up a pay type dollar limit, the order receives a forced authorization if:

- the credit card on the order is declined, and
- the dollar amount that requires authorization is greater than \$1.00 and is less than the pay type dollar limit you have set up for the credit card pay type on the order. **Note:** If you wish to force authorizations for credit cards requiring authorizations less than \$1.00, enter an authorization number in the [Authorization Number for Authorizations Under \\$1.00 \(I08\)](#) system control value.

In this situation, the order receives a forced authorization, and the system writes the [Default Credit Card Authorization Number for Soft Declines \(F93\)](#) to the Authorization number field on the Authorization History record. The system processes the authorization through Order Administration, as if the number that defaulted from the system control value was an actual authorization number. The order will be processed through pick slip generation and the system will produce pick slips for the order. The system also writes an order transaction history message indicating the authorization was forced.

If the Default Credit Card Authorization Number for Soft Declines (F93) system control value is blank, the order is placed on hold, using the vendor response hold reason code. If the hold reason code for the vendor response is blank, or a hold reason code has not been defined for the vendor response, the order is not placed on hold, and is processed through pick slip generation.

**Note:**

The system may still place the order on hold if it fails AVS authorization.

The system checks the following information to determine if an order should receive a forced authorization after it has been declined:

- the account provider code
- the Vendor response code received from the account provider
- the Entity associated with the order
- the credit card Pay type on the order that requires authorization

The system does not evaluate the order for pay type dollar limit if you are performing online authorization.

**Note:**

The system performs an edit against the pay type dollar limit defined for a vendor response before the number of authorization attempts logic. If the order passes the pay type dollar limit edit, the system does not perform the number of attempts edit against the order.

Entity pay type dollar limit summary:

Vendor response	Auth amount less than entity \$ limit to force auth	Auth amount greater than or equal to entity \$ limit to force auth
hold reason	The system does not place the order on hold. Order transaction history message: System Forced CC Auth - Auth# 999999.	The system places the order on hold, using the hold reason defined for the vendor response. Order transaction history message: SYS HLD - Declined Credit Card.

Pay type dollar limit example: This example shows how to set up a pay type dollar limit for a vendor response code.

Vendor Response	Description	Hold Reason Code
Vendor Response Value:		
42	Declined, card over limit	H4

Vendor Response	Entity	Pay Type	Dollar Limit
Pay Type Dollar Limit Values:			
42	555	4 VISA	\$50.00
42	555	5 MASTERCARD	\$75.00

Using the example, if an order did not pass authorization because it received a vendor response of 42, declined card over limit, the system would then perform an edit against the pay type dollar limit defined for the response.

If a pay type dollar limit was defined for the entity associated with the order, the pay type defined on the order, and the dollar amount on the order that required authorization was less than the dollar limit defined for the vendor response, the order would receive a forced authorization, using the Default Credit Card Authorization Number for Soft Declines (F93).

Using the example, an order would receive a forced authorization if the pay type on the order was VISA and the dollar amount for the VISA card was under \$50.00.

Entity item class dollar limits

You can set up an item class dollar limit for an AVS response for each entity in your company. You can use the item class dollar limit to reduce the amount of fraud. For example, a credit card may receive an AVS response of “all address matching”, but you may want to perform an additional check against the item class (such as high-theft items) assigned to one or more of the items on the order and the dollar amount that requires authorization.

- If the authorization amount is less than the item class dollar limit, the system releases the order from any AVS hold.
- If the authorization is greater than the item class dollar limit, the system places the order on hold using the hold reason defined for the item class dollar limit.

The system checks the following information to determine if an order should go on hold due to an item class dollar limit:

- the account provider code

- the AVS response code received from the account provider
- the Entity associated with the order
- the \$ limit to hold on the order
- the item class assigned to one or more of the items on the order requesting authorization

 Note:

- The item(s) assigned to the item class must be requesting authorization. For example, if the item assigned to the item class is on backorder, the other items on the order requesting authorization will not qualify for the item class dollar limit.
- If more than one item class on the order qualifies for an item class dollar limit, the system uses the item class associated with the lowest order number. For example, if order line 1 is associated with item class PNT and order line 3 is associated with item class ELC and both qualify, the system uses the item class dollar limit defined for item class PNT.

The system does not evaluate the order for item class dollar limit if the order does not pass authorization.

Entity item class dollar limit summary:

AVS response	Entity \$ limit	Auth amount less than entity \$ limit	Auth amount greater than or equal to entity \$ limit
hold reason	no hold reason	The system releases the order from AVS hold. Order transaction history message: AVS HLD Release - Item Class \$Limit.	The system places the order on hold, using the hold reason defined for the AVS response. Order transaction history message: SYS HLD - Declined Credit Card.
no hold reason	hold reason	The system does not place the order on hold.	The system places the order on hold, using the hold reason defined for the entity item class dollar limit. Order transaction history message: SYS HLD - Declined Credit Card.
no hold reason	no hold reason	The system does not place the order on hold.	The system does not place the order on hold.
hold reason	hold reason	The system releases the order from AVS hold. Order transaction history message: AVS HLD Release - Item Class \$Limit.	The system places the order on hold, using the hold reason defined for the entity item class dollar limit. Order transaction history message: SYS HLD - Declined Credit Card.

Item class dollar limit example: The following is an example of how to set up an item class dollar limit for an AVS response code.

AVS Response	Description	Hold Reason Code
I3	All Address Matching	None

Item class dollar limit to hold example:

AVS Response	Entity	Item Class	Dollar Limit	Hold Reason Code
I3	555	ELC	\$50.00	C1
I3	555	PNT	\$75.00	C2
I3	555	ZBA	\$150.00	C3

Using the example, if an order passed AVS because it received an AVS response of I3, all address matching, the system would then perform an edit against the item class dollar limit defined for the response.

If an item class dollar limit was defined for the entity associated with the order, the item class assigned to at least one of the items on the order requiring authorization, and the dollar amount on the order that required authorization is equal to or greater than the dollar limit defined for the AVS response, the order would then be placed on hold, using the hold reason code defined for the item class dollar limit.

Using the example, the system would assign the hold reason code C1 to an order if the order was associated with entity 555, item class ELC, and the dollar amount that required authorization was equal to or greater than \$50.00.

Entity postal code dollar limits

You can set up a postal code dollar limit for an AVS response for each entity in your company. You can use the postal code dollar limit to reduce the amount of fraud. For example, a credit card may receive an AVS response of "All Address Match", but you may want to perform an additional check against the postal code assigned to the bill to or sold to customer on the order and the dollar amount that requires authorization.

- If the authorization amount is less than the postal code dollar limit, the system releases the order from any AVS hold.
- If the authorization amount is greater than the postal code dollar limit, the system places the order on hold using the hold reason defined for the postal code dollar limit.

The system checks the following information to determine if an order should go on hold due to a postal code dollar limit:

- the account provider code
- the AVS response code received from the account provider
- the Entity associated with the order
- the postal code for the bill to customer on the order; if a bill to customer is not defined, the system validates the postal code for the sold to customer on the order
- the \$ limit to hold on the order

The system does not place the order on postal code dollar limit hold if the order does not pass authorization.

Entity postal code dollar limit summary:

AVS response	Entity \$ limit	Auth amount less than entity \$ limit	Auth amount greater than or equal to entity \$ limit
hold reason	no hold reason	The system releases the order from AVS hold. Order transaction history message: AVS HLD Release - Postal Code \$Limit.	The system places the order on hold, using the hold reason defined for the AVS response. Order transaction history message: SYS HLD - Declined Credit Card.
no hold reason	hold reason	The system does not place the order on hold.	The system places the order on hold, using the hold reason defined for the entity postal code dollar limit. Order transaction history message: SYS HLD - Declined Credit Card.
no hold reason	no hold reason	The system does not place the order on hold.	The system does not place the order on hold.
hold reason	hold reason	The system releases the order from AVS hold. Order transaction history message: AVS HLD Release - Postal Code \$Limit.	The system places the order on hold, using the hold reason defined for the entity postal code dollar limit. Order transaction history message: SYS HLD - Declined Credit Card.

Postal code dollar limit example: The following is an example of how to set up a postal code dollar limit for an AVS response code.

AVS Response	Description	Hold Reason Code
I3	All Address Matching	None

Postal code dollar limit to hold example:

AVS Response	Entity	Postal code	Dollar Limit	Hold Reason Code
I3	555	01468	\$50.00	P1
I3	555	01701	\$75.00	P2
I3	555	02053	\$150.00	P3

Using the example, if an order passed AVS because it received an AVS response of I3, all address matching, the system would then perform an edit against the postal code dollar limit defined for the response.

If a postal code dollar limit was defined for the entity associated with the order, the postal code assigned to the sold to, and the dollar amount on the order that required authorization is equal to or greater than the dollar limit defined for the AVS response, the order would then be placed on hold, using the hold reason code defined for the postal code dollar limit.

Using the example, the system would assign the hold reason code P1 to an order if the order was associated with entity 555, postal code 01468, and the dollar amount that required authorization was equal to or greater than \$50.00.

Vendor Response Setup Examples

Examples of different vendor responses, and how you might set them up on the system for credit card authorization before shipment, are:

Stolen credit card:

- do not reattempt authorization
- put the order on CF (credit card fraud) hold
- flag the order for cancellation

Over credit limit:

- put the order on hold for 5 days before reattempting authorization
- flag the order for cancellation after a number of declined authorizations

Transmission error:

- do not put the order on hold; reattempt authorization immediately

Address verification failed:

- do not reattempt authorization
- put the order on AV (address verification) hold

Card security value should be on the credit card:

- do not reattempt authorization
- put the order on CF (credit card fraud) hold



Note:

A pick slip will not print if the authorization is declined or if the order is on hold.

Determining the maximum number of declines: The system counts the number of declines for each different vendor response code separately. For example, if an authorization is declined twice for a transmission error, and is then declined for exceeding a credit limit, the counter starts again at 1 the first time you receive the new vendor response code.

The [Maximum Number of Retries on Credit Card Orders \(E74\)](#) system control value specifies the maximum number of all declines (with any vendor response that represents a decline) an order can accumulate before being flagged for cancellation. This value overrides the limit you specify for an individual vendor response. Be sure to set this system control value high enough that you do not inadvertently flag an order for cancellation when it still might be eligible for authorization.

Releasing held orders: The Release Orders on Time Hold periodic function evaluates held credit card orders for release based on their hold dates. See [Releasing Orders from Time Hold](#).

You can also use the Release Held Orders menu option to release orders one at a time. See [Manage Held Orders](#) in Modern View online help.

Canceling orders: You can use the [Working with Credit Card Cancellations \(WCCC\)](#) menu option to cancel all orders flagged for cancellation automatically. You can also set up this function as part of your periodic process.

About Deposits

Response codes may be used both for credit card authorizations and deposit authorizations. Typically, you would need to authorize a deposit because the order is using deferred or installment billing, and so you would not have a current authorization for the amount of the deposit you are processing.

The system does not perform the same types of actions against the order for a deposit authorization as it does for other authorizations. Specifically, the system does not reference the following fields (defined at the [Create Vendor Response Screen](#)) when processing an authorization for a deposit:

- Hold reason
- of authorization attempts
- of days between attempts
- Cancel reason
- Letter type

Similarly, the Maximum Number of Retries on Credit Card Orders (E74) system control value does not play a role in authorizing deposits.

Force deposit: You can set a vendor response code to "force deposit" in your company when you receive this response code from the deposit service. To do so, select the [Force deposit for FPO](#) flag for the response code. Forcing deposit means that you process all of the same updates in your company as if you had received an approval for the authorization.

Regular (non-payment plan) deposits are always forced.



Note:

You must make your own arrangements with the account provider regarding how to deal with unconfirmed or rejected deposit transactions.

The system checks the setting of this "force deposit" flag only when:

- you process a deposit for a deferred or installment pay plan
- the account provider supports force deposit
- the authorization is declined (that is, the response code is not 100)
- the system submitted the transaction with an action code of B (obtain both an authorization and deposit) rather than D (deposit only)

If you don't force: When a payment plan deposit fails authorization and is not forced, the deposit appears on the [Unconfirmed Deposits Listing Report](#). You can use [Manage Rejected Deposits](#) in Modern view to work with these deposits. Additionally, the order is placed on hold, and any orders that match the sold to customer and/or the credit card number are placed on hold as well.

More information:

- [Deferred/Installment Billing Overview](#)
- [Processing Auto Deposits \(SDEP\)](#)

Work with Vendor Response Screen

Purpose: This screen displays the response codes currently defined for the account provider. Use this screen to add, delete, or change a response code for the account provider.

You must create a vendor response code for each code used by the account provider. If the system receives a vendor response code it does not recognize, it puts the order on AVS hold.

EFTConnect: When creating an EFTConnect Merchant Account in the Payment Configuration option in Modern View, the EFTConnect response codes will be created automatically by the system. CyberSource and Adyen are mapped to each of the EFTConnect response codes. Navigate to the Vendor Responses screen in Work with Authorization Services to configure the fields. It is recommended to not delete these response codes, however they can be re-added if needed. See the EFTConnect xxx for a list of response codes.

PayPal: See the PayPal Direct Connection Integration for required response codes.

Customer Engagement Stored Value Card: See Stored Value Card Integration for a list of response codes.

How to display this screen: Select Responses for the account provider at the [Work with Authorization Services Screen](#)

Field	Description
Response code	The code assigned by the account provider that identifies whether the credit card was authorized or declined, and the reason for the authorization or decline. Alphanumeric, 10 positions; optional.
Description	The description of the response code. Alphanumeric, up to 40 positions; optional.

Option	Procedure
Change a vendor response code	Select Change for a response code to advance to the Change Vendor Response Screen. At this screen you can change any information except the Authorization service code and the Response code. See the Create Vendor Response Screen for field descriptions.
Delete a vendor response code	Select Delete for a response code to delete it.
Display a vendor response code	Select Display for a response code to advance to the Display Vendor Response Screen. You cannot change any information at this screen. See the Create Vendor Response Screen for field descriptions.
Work with ship via dollar limits and pay type dollar limits for a vendor response code	Select Response/Entity Details for a response code to advance to the Work with Ship Via \$ Limit to Hold Screen .
Create a vendor response code	Select Create to advance to the Create Vendor Response Screen .

Create Vendor Response Screen

Purpose: Use this screen to define the response codes that the account provider uses to indicate the disposition of the authorization, and how the system should then handle the order.

How to display this screen: Select Create at the [Work with Vendor Response Screen](#)

Field	Description
Response code	The code assigned by the account provider to identify whether the credit card was authorized or declined, and the reason for the authorization or decline. You should define each code used by the account provider on the system. If the account provider returns a response that the system does not recognize, the order appears on the Credit Card Authorization Listing as DECLINED (no description will appear) and is put on AVS hold; you must release the order through the Release Held Orders menu option, described in Manage Held Orders in Modern View online help. Deposits: See About Deposits for an example of how response codes may be used during deposits processing. Note: The INSUFFICIENT_FUNDS response code for the RLT authorization service (WASV) must be assigned a hold reason code of SV. Alphanumeric, 10 positions. Create screen: required. Change screen: display-only.
ORCE response	The code assigned by the Oracle Retail Customer Engagement account provider to identify whether the stored value card transaction was approved or declined. Use this field to map a response from Oracle Retail Customer Engagement to a vendor response code. This field displays only if the Authorization service code for the account provider is RLT. See Customer Engagement Stored Value Card Integration. Alphanumeric, 60 positions. Create screen: optional. Change screen: display-only.
Description 1	The description of the response code. You can use the description provided by the account provider or you can use your own description. Both lines of the description appear on the Credit Card Authorization Listing. You can also review it in standard order inquiry at the Authorization History Details Window. Deposits: The first line only of the response code description displays on the Display Deposit History Detail Screen in standard order inquiry when the account provider uses this response code for a deposit authorization. Alphanumeric, 100 positions; required.
Description 2	An additional description for the response code. Alphanumeric, 100 positions; optional.

Field	Description
Hold reason	The hold code to use for orders receiving this response. This a paytype-level hold; the order will be put on AT hold. The hold reason you enter here displays on the Credit Card Order Cancellation List when you process cancellations, so you can use this field as a description of the vendor response for that report. No pick slip prints if the order is placed on hold. If you assign a Hold date to the order (by completing the # of days between attempts field) you can release the order through the Release Orders on Time Hold periodic function. If not, you must use the Release Held Orders or Manual Credit Card Authorization function to release the order. Leave the Hold field blank if orders with this response code should not be placed on hold. Hold reason codes are defined in and validated against the Order Hold Reason table; see Establishing Order Hold Reason Codes (WOHR). Deposits: The system does not reference this field when processing an authorization for a deposit. See About Deposits. Alphanumeric, 2 positions; optional.
# authorization attempts (Number of authorization attempts)	The number of times to attempt to authorize an order before flagging it for cancellation. This field defines the number of attempts for this response code only; if the vendor returns a different response code, the count begins again at one. Enter 1 in this field if you want to flag an order for cancellation immediately. If this value is set to more than one, the system will continue to resubmit the order for authorization until the value is reached, provided the order is not held. The Maximum Number of Retries on Credit Card Orders (E74) system control value overrides this limit if it is lower than the maximum specified for a given response code. This system control value will also override the limit for a response code if the combined total authorization attempts for all responses on an order meets the maximum defined in the System Control table. Leave this field blank if you want to the system to continue to attempt authorization indefinitely (however, the system control value described above will override a blank value). Deposits: The system does not reference this field when processing an authorization for a deposit. See About Deposits. Online credit card authorization: The system does not reference this field when processing an online credit card authorizations. Numeric, 2 positions; optional.

Field	Description
# of days between attempts	The number of days to add to the current date when calculating a Hold until date for an order. Example: If the current date is 7/15, and this field is set to 5, the system assigns a <i>Hold until</i> date of 7/20. If you leave this field blank and: - if the Hold reason field is also blank, the system will repeatedly submit the order for reauthorization until the Number of authorization attempts is reached; - if you have defined a Hold reason, the system will never submit the order for reauthorization repeatedly (for example, if the order is flagged for cancellation; see Cancel reason). The Release Orders on Time Hold periodic function releases an order from hold once the Hold date is reached. See Releasing Orders from Time Hold. Deposits: The system does not reference this field when processing an authorization for a deposit. See About Deposits. Online credit card authorization: The system does not reference this field when processing an online credit card authorization. Numeric, 2 positions; optional.
Cancel reason	The cancel reason to use when an order has reached the # authorization attempts (Number of authorization attempts), or in the number in the system control value (whichever is lower). As part of this process, the order is flagged for cancellation; you use the Working with Credit Card Cancellations (WCCC) option to cancel such orders. You can also set this function up as part of your periodic processing. If an order becomes eligible for cancellation because its total number of authorization attempts meet the maximum defined in the System Control table, the system uses the cancellation code associated with the most recently received vendor response. Cancel reason codes are defined in and validated against the Cancel Reason Code table; see Establishing Cancel Reason Codes (WCNR). Deposits: The system does not reference this field when processing an authorization for a deposit. See About Deposits. Online credit card authorization: The system does not reference this field when processing an online credit card authorization. Numeric, 2 positions; optional (required if you enter a value in the # authorization attempts field).
Force deposit for FPO	Indicates whether to process all the usual updates for a deposit when you receive this response code from the account provider, even though this response code actually represents a decline. Selected = force deposit Unselected (default) = Do not force deposit About Deposits

Field	Description
Pop up window messages (online authorization messages)	Four additional fields where you can enter a message indicating whether the credit card is approved or declined and if any action should be taken, such as asking the customer to repeat the credit card number or requesting a different credit card for authorization. Note: These fields only display if the On-line Authorizations (B89) system control value is selected and the Batch/online field for the account provider is set to I (online authorization only) or C (online and batch authorization). If you are sending credit cards for authorization during order entry (the On-line Authorizations (B89) system control value is selected), the system displays the Select Authorization Response Option Window in order entry when a response is received from the account provider. This window displays the pop up window messages you defined for this vendor response. See Performing Online Credit Card Authorizations for an overview on online authorizations and the required setup. Alphanumeric, four 40-positions fields; optional.

Select Entity for Vendor Response Details Screen

Purpose: Use this screen to define more information for a vendor response for each entity in your company. At this screen you can:

- define a ship via dollar limit for an AVS response code to perform an additional edit against the authorization amount if the ship via on the order matches a ship via dollar limit and the sold to customer and ship to customer are different.
- define a pay type dollar limit to force an authorization for a declined vendor response code.
- define an item class dollar limit for an AVS response code to perform an additional edit against the authorization amount if one or more item(s) on the order requiring authorization has an item class that matches an item class dollar limit.
- define a postal code dollar limit for an AVS response code to perform an additional edit against the authorization amount if the postal code for the sold to on the order matches a postal code dollar limit.

How to display this screen: On the [Work with Vendor Response Screen](#), select Response/Entity Details for a vendor response

Field	Description
Authorization service	The code and description to identify the account provider for which you are working with vendor response details. This is the account provider you selected at the Work with Authorization Services Screen. Authorization code: Alphanumeric, 3 positions; display-only. Authorization description: Alphanumeric, 30 positions; display-only.

Field	Description
Response code	The code and description assigned by the account provider that identifies whether the credit card was authorized or declined, and the reason for the authorization or decline. This is the vendor response you selected on the Work with Vendor Response Screen. For ship via dollar limit, postal code dollar limit, and item class dollar limit, this must be an AVS response code. Pay type dollar limit applies to a vendor response code. Vendor response code: Alphanumeric, 10 positions; display-only. Vendor response description: Alphanumeric, 40 positions; display-only.
Entity	A code for the entity for which you wish to create vendor response details. An entity is a component of the sales reporting hierarchy. An entity can represent the business units in your company, for example, mail order, retail, wholesale). A list of all the valid entity records set up for the company you are currently in displays. Entity codes are defined in and validated against the Entity table. See Working with Entities (WENT). Numeric, 3 positions; optional.
Description	A description of the entity. Alphanumeric, 25 positions; optional.

Screen Option	Procedure
Define ship via dollar limits for a specific entity	Select Ship Via \$ Limit for an entity to advance to the Work with Ship Via \$ Limit to Hold Screen .
Define pay type dollar limits for a specific entity	Select Pay Type \$ Limit for an entity to advance to the Work with Pay Type \$ Limit to Force Authorization Screen .
Define item class dollar limits for a specific entity	Select Item Class \$ Limit for an entity to advance to the Work with Item Class \$ Limit to Hold Screen .
Define postal code dollar limits for a specific entity	Select Postal Code \$ Limit for an entity to advance to the Work with Postal Code \$ Limit to Hold Screen .

Work with Ship Via \$ Limit to Hold Screen

Purpose: Use this screen to create and maintain ship via dollar limits for a specific entity, AVS response, and account provider.

Ship via dollar limit defines whether a dollar limit is applied to the ship via on the order.

- If the authorization amount is less than the ship via dollar limit, the system releases the order from any AVS hold.
- If the authorization amount is greater than the ship via dollar limit, the system places the order on hold using the hold reason defined for the ship via dollar limit.

You might use this if you want to keep a careful check for stolen credit cards. For example, you can place an order on hold if the order is associated with a Federal Express ship via and the dollar amount required for authorization is greater than \$200.00.

See [Entity ship via dollar limits](#) for more information on the processing the system performs.

**Note:**

If you are performing online authorization, the system does not validate entity ship via dollar limit.

How to display this screen: Select Ship Via \$ Limit for an entity on the [Work with Vendor Response Screen](#)

Field	Description
Authorization service	The code and description of the account provider for which you are working with ship via dollar limits. This is the account provider you selected on the Work with Authorization Services Screen. Authorization code: Alphanumeric, 3 positions; display-only. Authorization description: Alphanumeric, 30 positions; display-only.
Response code	The code and description assigned by the account provider that identifies whether the credit card passed address verification. This is the AVS response you selected on the Work with Vendor Response Screen. Response code: Alphanumeric, 10 positions; display-only. Response description: Alphanumeric, 40 positions; display-only.
Entity	The code and description of the entity you selected on the Select Entity for Vendor Response Details Screen. Entity code: Numeric, 3 positions; display-only. Entity description: Alphanumeric, 25 positions; display-only.
Ship Via	A code for the carrier you use to ship merchandise. Ship via codes are defined in and validated against the Ship Via table using Working with Ship Via Codes (WVIA). Numeric, 2 positions; optional.
\$ Limit to Hold	The dollar limit that defines when the system places the order on hold. The system places an order on hold when the order meets the account provider/AVS response code/entity/ship via code combination and the dollar amount the requires authorization is greater than the amount defined for the ship via dollar limit. The system assigns the hold reason code defined for the ship via dollar limit to the order. Conversely, if you do not define a hold reason, the system does not place an order on hold if the order does not pass AVS authorization, but is under the ship via dollar amount specified. Numeric, 13 positions with a 2-place decimal; optional.
Hold Reason	The hold reason code to assign to orders whose authorization amount is greater than the ship via dollar limit. Alphanumeric, 2 positions; optional.
Description	A description of the hold reason code. Alphanumeric, 50 positions; optional.

Screen Option	Procedure
Change a ship via dollar limit	Select Change for a ship via dollar limit to hold to advance to the Change Ship Via \$ Limit to Hold Screen. At this screen you can change the ship via, dollar limit, and hold reason code. See the Create Ship Via \$ Limit to Hold Screen for field descriptions.
Delete a ship via dollar limit	Select Delete for a ship via dollar limit to hold to delete it.
Display a ship via dollar limit	Select Display for a ship via dollar limit to hold to advance to the Display Ship Via \$ Limit to Hold Screen. You cannot change any information at this screen. See the Create Ship Via \$ Limit to Hold Screen for field descriptions.
Create a ship via dollar limit	Select Create to advance to Create Ship Via \$ Limit to Hold Screen .

Create Ship Via \$ Limit to Hold Screen

Purpose: Use this screen to create a ship via dollar limit.

How to display this screen: Select Create on the [Work with Ship Via \\$ Limit to Hold Screen](#).

Field	Description
Authorization service	The code and description of the account provider for which you are creating a ship via dollar limit. This is the account provider you selected on the Work with Authorization Services Screen. Authorization code: Alphanumeric, 3 positions; display-only. Authorization description: Alphanumeric, 30 positions; display-only.
Response code	The code and description of the AVS response code assigned by the account provider that identifies whether the credit card pass address verification. This is the AVS response you selected on the Work with Vendor Response Screen. Response code: Alphanumeric, 10 positions; display-only. Response description: Alphanumeric, 40 positions; display-only.
Entity	The code and description of the entity you selected on the Work with Vendor Response Screen. Entity code: Numeric, 3 positions; display-only. Entity description: Alphanumeric, 25 positions; display-only.
Ship via	A code for the carrier you use to ship merchandise. An error message indicates if you try to create a ship via dollar limit for a ship via that already has a dollar limit defined for this AVS response code and entity: Duplicate record exists. Ship via codes are defined in and validated against the Ship Via table using Working with Ship Via Codes (WVIA). Numeric, 2 positions; optional.

Field	Description
\$ limit to hold	The dollar limit that defines when the system places the order on hold. The system places an order on hold when the order meets the account provider/AVS response code/entity/ship via code combination and the dollar amount that requires authorization is greater than the amount defined for the ship via dollar limit. The system assigns the hold reason code defined for the ship via dollar limit to the order. Conversely, if you do not define a dollar limit, the system does not place an order on hold if the order does not pass AVS authorization, but is under the ship via dollar amount specified. An error message indicates if you try to enter a dollar limit that is less than \$1.00: Ship Via \$ Limit cannot be less than One. Numeric, 13 positions with a 2-place decimal; optional.
Hold reason	A code for the hold reason the system assigns to the order when the authorization amount is greater than the ship via dollar limit. This is a paytype level hold; the order will be put on AT hold. The hold reason you enter here displays on the Credit Card Order Cancellation List when you process cancellations. No pick slip prints if the order is on hold. Hold reason codes are defined in and validated against the Order Hold Reason table; see Establishing Order Hold Reason Codes (WOHR). Alphanumeric, 2 positions; optional.

Work with Pay Type \$ Limit to Force Authorization Screen

Purpose: Use this screen to create and maintain pay type dollar limits.

Pay type dollar limit defines whether a dollar limit to force an authorization is applied to a specific pay type.

See [Entity pay type dollar limits](#) for more information on the processing the system performs.



Note:

If you are performing online authorization, the system does not validate entity pay type dollar limit.

How to display this screen: On the [Work with Vendor Response Screen](#), select Pay Type \$ Limit for an entity.

Field	Description
Authorization service	The code and description of the account provider for which you are working with pay type dollar limits for a vendor response. This is the account provider you selected on the Work with Authorization Services Screen. Authorization code: Alphanumeric, 3 positions; display-only. Authorization description: Alphanumeric, 30 positions; display-only.
Response code	The code and description of the vendor response assigned by the account provider that identifies whether the credit card was authorized or declined, and the reason for the authorization or decline. This is the vendor response you selected on the Work with Vendor Response Screen. Response code: Alphanumeric, 10 positions; display-only. Response description: Alphanumeric, 40 positions; display-only.
Entity	The code and description of the entity you selected on the Select Entity for Vendor Response Details Screen. Entity code: Numeric, 3 positions; display-only. Entity description: Alphanumeric, 25 positions; display-only.
Pay type	A code used to identify a method of payment on an order. Pay type codes are defined in and validated against the Pay Type table. Numeric, 2 positions; optional.
Description	A description of the pay type. Alphanumeric, 30 positions; display-only.
Dollar limit to force authorization	The dollar limit that indicates whether the order is eligible for a forced authorization. If the dollar amount for the credit card is greater than \$1.00 but less than the dollar amount defined, the system forces an authorization. Note: If you wish to force authorizations for credit cards requiring authorizations less than \$1.00, enter an authorization number in the Authorization Number for Authorizations Under \$1.00 (I08) system control value. Numeric, 13 positions with a 2-place decimal; optional.

Screen Option	Procedure
Change a pay type dollar limit	Select Change for a pay type dollar limit to advance to the Change Pay Type \$ Limit to Force Authorization Screen. You can change the pay type code or dollar amount on this screen. See the Create Pay Type \$ Limit to Force Authorization Screen for field descriptions.
Delete a pay type dollar limit	Select Delete for a pay type dollar limit to delete it.

Screen Option	Procedure
Display a pay type dollar limit	Select Display for a pay type dollar limit to advance to the Display Pay Type \$ Limit to Force Authorization Screen. You cannot change any information at this screen. See the Create Pay Type \$ Limit to Force Authorization Screen for field descriptions.
Create a pay type dollar limit	Select Create to advance to the Create Pay Type \$ Limit to Force Authorization Screen .

Create Pay Type \$ Limit to Force Authorization Screen

Purpose: Use this screen to create a pay type dollar limit.

How to display this screen: Select Create on the [Work with Pay Type \\$ Limit to Force Authorization Screen](#).

Field	Description
Authorization service	The code and description of the account provider for which you are creating a pay type dollar limit for a vendor response. This is the account provider you selected on the Work with Authorization Services Screen. Authorization code: Alphanumeric, 3 positions; display-only. Authorization description: Alphanumeric, 30 positions; display-only.
Response code	The code and description of the response assigned by the account provider that identifies whether the credit card was authorized or declined, and the reason for the authorization or decline. This is the vendor response you selected on the Work with Vendor Response Screen. Response code: Alphanumeric, 10 positions; display-only. Response description: Alphanumeric, 40 positions; display-only.
Entity	The code and description of the entity you selected on the Select Entity for Vendor Response Details Screen. Entity code: Numeric, 3 positions; display-only. Entity description: Alphanumeric, 25 positions; display-only.
Pay type	A code used to identify a method of payment on an order. Pay type codes are defined in and validated against the Pay Type table; see Working with Pay Types (WPAY). An error message indicates if you try to create a pay type dollar limit for a pay type that already has a pay type dollar limit defined for this vendor response and entity: Duplicate record exists. An error message indicates if you enter a pay type other than a credit card pay type: Pay Type entered must be a credit card. Numeric, 2 positions; required.

Field	Description
\$ limit to authorization	The dollar amount that you wish to use to force a credit card authorization. If the dollar amount defined for the credit card is greater than \$1.00 but less than the amount you define, the system forces the credit card authorization. If the dollar amount defined for the credit card is equal to or greater than the amount you define, the system does not authorize the credit card. An error message indicates if you enter a dollar amount that is less than \$1.00: Pay Type \$ Limit cannot be less than One Dollar (\$1.00). Note: If you wish to force authorizations for credit cards requiring authorizations less than \$1.00, enter an authorization number in the Authorization Number for Authorizations Under \$1.00 (I08) system control value. Numeric, 13 positions with a 2-place decimal; required.

Work with Item Class \$ Limit to Hold Screen

Purpose: Use this screen to create and maintain item class dollar limits.

Item class dollar limit defines whether a dollar limit is applied to the item class associated with an item on the order that requires authorization.

- If the authorization amount is less than the item class dollar limit, the system releases the order from any AVS hold.
- If the authorization is greater than the item class dollar limit, the system places the order on hold using the hold reason defined for the item class dollar limit.

You might use this if you want to keep a careful check for stolen credit cards. For example, you can place an order on hold if at least one of the items on the order requesting authorization is assigned to item class PNT (high-fraud items) and the dollar amount required for authorization is greater than \$200.00.

See [Entity item class dollar limits](#) for more information on the processing the system performs.

How to display this screen: Select Item Class \$ Limit for an entity on the [Work with Vendor Response Screen](#).

Field	Description
Authorization service	The code and description to identify the account provider for which you are working with item class dollar limits. This is the account provider you selected on the Work with Authorization Services Screen. Authorization code: Alphanumeric, 3 positions; display-only. Authorization description: Alphanumeric, 30 positions; display-only.
Response code	The code and description assigned by the account provider that identifies whether the credit card passed address verification. This is the AVS response you selected at the Work with Vendor Response Screen. Response code: Alphanumeric, 10 positions; display-only. Response description: Alphanumeric, 40 positions; display-only.

Field	Description
Entity	The code and description of the entity you selected on the Select Entity for Vendor Response Details Screen . Entity code: Numeric, 3 positions; display-only. Entity description: Alphanumeric, 25 positions; display-only.
Item class	A code for an item class used to group like items together. Item class codes are defined in and validated against the Item Class table. Alphanumeric, 3 positions; optional.
\$ Limit To Hold	The dollar limit that defines when the system places the order on hold. The system places an order on hold when the order meets the account provider/AVS response code/entity/item class combination and the dollar amount that requires authorization is greater than the amount defined for the item class dollar limit. The system assigns the hold reason code defined for the item class dollar limit to the order. Conversely, if you do not define a hold reason, the system does not place an order on hold if the order does not pass AVS authorization, but is under the item class dollar amount specified. Numeric, 13 positions with a 2-place decimal; optional.
Hold Reason/ Description	The code and description of the hold reason to assign to orders whose authorization amount is greater than the item class dollar limit. Code: Alphanumeric, 2 positions; optional. Description: Alphanumeric, 50 positions; display-only.

Screen Option	Procedure
Create an item class dollar limit	Select Create to advance to the Create Item Class \$ Limit to Hold Screen .
Change an item class dollar limit	Select Change for an item class dollar limit to hold to advance to the Change Item Class \$ Limit to Hold Screen .
Delete an item class dollar limit	Select Delete for an item class dollar limit to hold to delete it.
Display an item class dollar limit	Select Display for an item class dollar limit to hold to advance to the Display Item Class \$ Limit to Hold Screen .

Create Item Class \$ Limit to Hold Screen

Purpose: Use this screen to create an item class dollar limit.

How to display this screen: Select Create at the [Work with Item Class \\$ Limit to Hold Screen](#).

Field	Description
Authorization service	The code and description of the account provider for which you are creating an AVS response item class dollar limit. This is the account provider you selected at the Work with Authorization Services Screen . Authorization code: Alphanumeric, 3 positions; display-only. Authorization description: Alphanumeric, 30 positions; display-only.

Field	Description
Response code	The code and description of the AVS response code assigned by the account provider that identifies whether the credit card passed address verification. This is the AVS response you selected at the Work with Vendor Response Screen. Response code: Alphanumeric, 10 positions; display-only. Response description: Alphanumeric, 40 positions; display-only.
Entity	The code and description of the entity you selected at the Select Entity for Vendor Response Details Screen. Entity code: Numeric, 3 positions; display-only. Entity description: Alphanumeric, 25 positions; display-only.
Item class	A code for an item class used to group like items together. Item class codes are defined in and validated against the Item Class table. An error message indicates if you try to create an item class dollar limit for an item class that already has a dollar limit defined for the vendor response code and entity: Duplicate record exists. Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.
\$ limit to hold	The dollar limit that defines when the system places the order on hold. The system places an order on hold when the order meets the account provider/AVS response code/entity/item class combination and the dollar amount that requires authorization is greater than the amount defined for the item class dollar limit. The system assigns the hold reason code defined for the item class dollar limit to the order. Conversely, if you do not define a hold reason, the system does not place an order on hold if the order does not pass AVS authorization, but is under the item class dollar amount specified. An error message indicates if you try to enter a dollar limit that is less than \$1.00: Item Class \$ Limit cannot be less than \$1.00. Numeric, 13 positions with a 2-place decimal; required.
Hold reason	A code for the hold reason the system assigns to the order when the order meets the item class dollar limit hold requirements. This is a paytype level hold; the order will be put on AT hold. The hold reason you enter here displays on the Credit Card Order Cancellation List when you process cancellations. No pick slip prints if the order is on hold. Hold reason codes are defined in and validated against the Order Hold Reason table; see Establishing Order Hold Reason Codes (WOHR). Alphanumeric, 2 positions; optional.

Change Item Class \$ Limit to Hold Screen

To change: At the [Work with Item Class \\$ Limit to Hold Screen](#), select Change for an item class dollar limit to hold to advance to the Change Item Class \$ Limit to Hold screen. At this screen, you can change the \$ limit to hold and hold reason code.

See [Create Item Class \\$ Limit to Hold Screen](#) for a description of the fields on this screen.

Display Item Class \$ Limit to Hold Screen

To display: At the [Work with Item Class \\$ Limit to Hold Screen](#), select Display for an item class dollar limit to hold to advance to the Display Item Class \$ Limit to Hold screen. You cannot change any fields on this screen.

See [Create Item Class \\$ Limit to Hold Screen](#) for a description of the fields on this screen.

Work with Postal Code \$ Limit to Hold Screen

Purpose: Use this screen to create and maintain postal code dollar limits.

Postal code dollar limit defines whether a dollar limit is applied to the postal code for the sold to customer on the order.

- If the authorization amount is less than the postal code dollar limit, the system releases the order from any AVS hold.
- If the authorization amount is greater than the postal code dollar limit, the system places the order on hold using the hold reason defined for the postal code dollar limit.

You might use this if you want to keep a careful check for stolen credit cards. For example, you can place an order on hold if the order is associated with a high-crime delivery area and the dollar amount required for authorization is greater than \$200.00.

See [Entity postal code dollar limits](#) for an example and additional processing logic.

How to display this screen: Select Postal Code \$ Limit for an entity at the [Select Entity for Vendor Response Details Screen](#).

Field	Description
Authorization service	The code and description of the account provider for which you are working with postal code dollar limits. This is the account provider you selected on the Work with Authorization Services Screen . Authorization code: Alphanumeric, 3 positions; display-only. Authorization description: Alphanumeric, 30 positions; display-only.
Response code	The code and description assigned by the account provider that identifies whether the credit card passed address verification. This is the vendor response you selected at the Work with Vendor Response Screen . Response code: Alphanumeric, 10 positions; display-only. Response description: Alphanumeric, 40 positions; display-only.
Entity	The code and description of the entity you selected on the Select Entity for Vendor Response Details Screen . Entity code: Numeric, 3 positions; display-only. Entity description: Alphanumeric, 25 positions; display-only.
Postal code	A code for a postal code or zip code representing a delivery area. Alphanumeric, 10 positions; optional.

Field	Description
\$ Limit To Hold	The dollar limit that defines when the system places the order on hold. The system places an order on hold when the order meets the account provider/AVS response code/entity/postal code combination and the dollar amount that requires authorization is greater than the amount defined for the postal code dollar limit. The system assigns the hold reason code defined for the postal code dollar limit to the order. Conversely, if you do not define a hold reason, the system does not place an order on hold if the order does not pass AVS authorization, but is under the postal code dollar amount specified. Numeric, 13 positions with a 2-place decimal; optional.
Hold Reason/Description	The code and description of the hold reason to assign to orders whose authorization amount is greater than the postal code dollar limit. Code: Alphanumeric, 2 positions; optional. Description: Alphanumeric, 50 positions; display-only.

Screen Option	Procedure
Create a postal code dollar limit to hold	Select Create to advance to the Create Postal Code \$ Limit to Hold Screen .
Change a postal code dollar limit to hold	Select Change for a postal code dollar limit to hold to advance to the Change Postal Code \$ Limit to Hold Screen .
Delete a postal code dollar limit to hold	Select Delete for a postal code dollar limit to hold to delete it.
Display a postal code dollar limit to hold	Select Display for a postal code dollar limit to hold to advance to the Display Postal Code \$ Limit to Hold Screen .

Create Postal Code \$ Limit to Hold Screen

Purpose: Use this screen to create a postal code dollar limit.

How to display this screen: Select Create at the [Work with Postal Code \\$ Limit to Hold Screen](#).

Field	Description
Authorization service	The code and description of the account provider for which you are creating an AVS response postal code dollar limit. This is the account provider you selected at the Work with Authorization Services Screen. Authorization code: Alphanumeric, 3 positions; display-only. Authorization description: Alphanumeric, 30 positions; display-only.

Field	Description
Response code	The code and description of the AVS response assigned by the account provider that identifies whether the credit card passed address verification. This is the AVS response you selected at the Work with Vendor Response Screen. Response code: Alphanumeric, 10 positions; display-only. Response description: Alphanumeric, 40 positions; display-only.
Entity	The code and description of the entity you selected at the Select Entity for Vendor Response Details Screen. Entity code: Numeric, 3 positions; display-only. Entity description: Alphanumeric, 25 positions; display-only.
Postal code	A code for a postal code or zip code representing a delivery area. Postal codes are defined in and validated against the Zip/City/State table. An error message indicates if you try to create a postal code dollar limit for a postal code that already has a dollar limit defined for the AVS response and entity: Duplicate record exists. Alphanumeric, 5 positions. Create screen: required. Change screen: display-only.
\$ limit to hold	The dollar limit that defines when the system places the order on hold. The system places an order on hold when the order meets the account provider/AVS response code/entity/postal code combination and the dollar amount that requires authorization is greater than the amount defined for the postal code dollar limit. The system assigns the hold reason code defined for the postal code dollar limit to the order. Conversely, if you do not define a hold reason, the system does not place an order on hold if the order does not pass AVS authorization, but is under the postal code dollar amount specified. An error message indicates if you try to enter a dollar limit that is less than \$1.00: Postal Code \$ Limit cannot be less than \$1.00. Numeric, 13 positions with a 2-place decimal; required.
Hold reason	A code for the hold reason the system assigns to the order when the authorization amount is greater than the postal code dollar limit. This is a paytype level hold; the order will be put on AT hold. The hold reason you enter here displays on the Credit Card Order Cancellation List when you process cancellations. No pick slip prints if the order is on hold. Hold reason codes are defined in and validated against the Order Hold Reason table; see Establishing Order Hold Reason Codes (WOHR). Alphanumeric, 2 positions; optional.

Change Postal Code \$ Limit to Hold Screen

To change: At the [Work with Postal Code \\$ Limit to Hold Screen](#), select Change for a postal code dollar limit to hold to advance to the Change Postal Code \$ Limit to Hold screen. At this screen, you can change the \$ limit to hold and hold reason code.

See [Create Postal Code \\$ Limit to Hold Screen](#) for a description of the fields on this screen.

Display Postal Code \$ Limit to Hold Screen

To display: At the [Work with Postal Code \\$ Limit to Hold Screen](#), select Display for a postal code dollar limit to hold to advance to the Display Item Class \$ Limit to Hold screen. You cannot change any fields on this screen.

See [Create Postal Code \\$ Limit to Hold Screen](#) for a description of the fields on this screen.

Defining Merchant ID Overrides

Purpose: Use merchant ID overrides to set up overrides for the different entities in your company.

When used: You use the merchant ID, which the account provider assigns, to identify your company when you transmit information to the account provider. Although you can set up a default ID for your company, you may need to set up overrides for each separate entity under which you perform authorizations and deposits. Not used for EFTConnect account providers.

Access to screens: The screens you use to work with merchant ID overrides are available through the [Work with Authorization Services Screen](#).

Source code points to entity: The system determines the entity for a customer order based on the source code on the order header. When you create a source code you must specify a division, and when you create a division you must specify an entity. In this way, the source code on the order header indicates which merchant ID override to use for transactions related to the order.

Deferred/installment pay plans: If you use deferred or installment billing, you would also use these screens to set up merchant ID overrides for transactions related to these orders. See [Deferred/Installment Billing Overview](#) for more information on pay plans.

In this topic:

- [Work with Merchant ID Overrides Screen](#)
- [Create Merchant ID by Entity Screen](#)

For more information:

- [Introducing Offer and Source Codes](#)
- [Working with Entities \(WENT\)](#)
- [Working with Divisions \(WDIV\)](#)

Work with Merchant ID Overrides Screen

How to display this screen: Select Merchant ID Override for an authorization service at the [Work with Authorization Services Screen](#).

Field	Description
Authorization service	The service code representing the authorization service you selected at the Work with Authorization Services Screen . Alphanumeric, 3 positions; display-only.
Entity	The code representing an entity with a unique merchant ID. Numeric, 3 positions; optional.

Field	Description
Merchant ID	An account number assigned by the account provider to identify transmissions to/from a particular entity in your company. The default merchant ID, used for regular (as opposed to pay plan) transactions displays. To review the deferred or installment merchant IDs, select Change or Display for the entity. Alphanumeric, 20 positions; optional.

Screen Option	Procedure
Create a new merchant ID override	Select Create to advance to the Create Merchant ID by Entity Screen .
Change a merchant ID override	Select Change for a merchant ID override to advance to the Change Merchant ID Override Screen. At this screen, you can change the merchant ID fields and API fields. See the Create Merchant ID by Entity Screen for field descriptions.
Delete a merchant ID override	Select Delete for a merchant ID override to delete it.
Display a merchant ID override	Select Display for a merchant ID override to advance to the Display Merchant ID Override Screen. You cannot change any information at this screen. See the Create Merchant ID by Entity Screen for field descriptions.

Create Merchant ID by Entity Screen

Purpose: Use this screen to create a new merchant ID override for orders associated with a specific entity in your company.

How to display this screen: Select Create at the [Work with Merchant ID Overrides Screen](#).

Field	Description
Entity	Enter the entity associated with the merchant ID. Entities are defined in and validated against the Entity table; see Working with Entities (WENT) . Numeric, 3 positions. Create screen: required. Change screen: display-only.
Merchant ID	Enter the merchant ID to use when transmitting information to an authorization or deposit service for orders associated with this entity (based on the division associated with the source code on the order header). This is the merchant ID to use for regular, as opposed to pay plan, transactions. Note: You can enter upper and lower case letters in this field. Alphanumeric, 20 positions; required.

Field	Description
Deferred merchant ID	Enter the merchant ID to use when transmitting transactions to a account provider for orders that are associated with this entity, and which are using a deferred billing pay plan. Deferred and installment pay plans are available only if the Deferred and Installment Billing (F51) system control value is selected. See Deferred/Installment Billing Overview. Note: You can enter upper and lower case letters in this field. Alphanumeric, 20 position; optional.
Installment merchant ID	Enter the merchant ID to use when transmitting transactions to a account provider for orders that are associated with this entity, and which are using an installment plan. Deferred and installment pay plans are available only if the Deferred and Installment Billing (F51) system control value is selected. See Deferred/Installment Billing Overview. Note: You can enter upper and lower case letters in this field. Alphanumeric, 20 positions; optional.
API User name	The user name, provided by PayPal, used to establish a direct connection to the PayPal system during deposit processing. Note: You can enter upper and lower case letters in this field. Alphanumeric, 64 positions; optional.
API Password	The password, provided by PayPal, used to establish a direct connection to the PayPal system during deposit processing. Note: You can enter upper and lower case letters in this field. Alphanumeric, 64 positions; optional.
API Signature	The encrypted signature, provided by PayPal, used to establish a direct connection to the PayPal system during deposit processing. Note: You can enter upper and lower case letters in this field. Alphanumeric, 128 positions; optional.

Defining Authorization Service Currencies

Purpose: Use the Work with Authorization Currency function to set up cross references between the currency codes you use in Order Administration and the account provider's codes. The system uses these cross references to determine which currency code to pass to the account provider when authorizing credit cards and processing deposits. Use this screen to create, change, or delete the currency cross reference information for an External Payment Service or EFTConnect account provider.

In this topic:

- [Work with Authorization Service Currency Screen](#)
- [Create Authorization Service Currency Screen](#)

Work with Authorization Service Currency Screen

How to display this screen: Select Currency for the authorization service at the [Work with Authorization Services Screen](#).

Field	Description
Authorization service	The service to use the cross references. The service you selected at the Work with Authorization Services Screen displays. Code: alphanumeric, 3 positions; display-only. Description: alphanumeric, 30 positions; display-only.
Currency	The code identifying a type of currency in Order Administration. Currency codes are defined in and validated against the Currency table; see Working with Currency (WCUR) . Alphanumeric, 3 positions; optional.
Authorization Service Currency	The related currency code used by the authorization service. Alphanumeric, 3 positions; optional.

Select Option	Procedure
Change an authorization service currency code cross reference	Select Change for a currency code to advance to the Change Authorization Service Currency Screen. At this screen you can change only the authorization service currency code. See the Create Authorization Service Currency Screen for field descriptions.
Delete an authorization service currency code	Select Delete for a currency code to delete it.
Display an authorization service currency code cross reference	Select Display for a currency code to advance to the Display Authorization Service Currency Screen. You cannot change any information at this screen. See the Create Authorization Service Currency Screen for field descriptions.
Create an authorization service currency code cross reference	Select Create to advance to the Create Authorization Service Currency Screen .

Create Authorization Service Currency Screen

Purpose: Use this screen to define an equivalency between a currency code in your company and a currency code used by the account provider.

How to display this screen: Select Create at the [Work with Authorization Service Currency Screen](#).

Field	Description
Authorization service	The account provider to use the cross references. The account provider you selected at the Work with Authorization Services Screen displays. Code: alphanumeric, 3 positions; display-only. Description: alphanumeric, 30 positions; display-only.
Currency	The code identifying a type of currency in your company. Currency codes are defined in and validated against the Currency table; see Working with Currency (WCUR) . Alphanumeric, 3 positions. Create screen: optional. Change screen: display-only.

Field	Description
Authorization service currency	The related currency code used by the account provider. Alphanumeric, 3 positions; optional.

Performing Online Credit Card Authorizations

Overview: Online credit card authorization allows you to send and receive the information required to authorize a credit card when the order is placed instead of when the pick slip is generated for the order.

Quotes: If the Online Authorization field for a quote order type is selected, the system performs online authorization during quote entry; see [Entering Pre-Order Quotes](#) for an overview.

In this topic: This topic provides an overview of the online credit card authorization process and the required setup.

- [Receiving a Credit Card Authorization During Order Entry](#)
 - [What Credit Card Amount is Sent for Authorization?](#)
 - [Hierarchy for Placing the Credit Card On Hold](#)
 - [What Happens When a Credit Card is Approved?](#)
 - [What Happens When a Credit Card is Declined?](#)
 - [When Communication Failures Occur](#)
 - [What Happens When an Undefined Response is Returned?](#)
 - [Select Authorization Response Option Window](#)
- [Resending Credit Cards for Authorization](#)
- [Pick Slip Generation](#)
- [Credit Card Authorization List](#)
- [Transmitting and Receiving Deposits](#)
- [Online Authorization Process](#)
- [Online Credit Card Authorization Setup](#)
 - [System Control Values](#)
 - [Number Assignment Value](#)
 - [Account Provider Settings](#)
 - [Order Types](#)
 - [Pay Types](#)
 - [Pick Slip Generation](#)

Receiving a Credit Card Authorization During Order Entry

The system performs online authorization when you select Accept to accept an order after determining if the order should go on hold due to the credit card payment method. Note that online authorization can still take place if the order is on hold for another reason, provided the order is eligible.

Generic order interface: If you receive orders through the *Generic Order Interface (Order API)*, the system performs online authorization after determining if the order should go on hold and performing credit card tokenization; see *Performing Online Credit Card Authorization on Web Orders*.

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

Batch order entry: If you are using batch order entry, the system performs online authorization when you accept a batch at the [Work with Error Orders Batches Screen](#) or [Select Customer Sold To For Order Screen](#).

Order maintenance: The system performs online authorization when you select Auth On-Line for a credit card payment on the [Enter Payment Methods Screen](#).

When you convert a quote to an order in order maintenance, the system will perform online authorization for eligible payment methods only if the [Authorize Full Amount During Order Entry \(G99\)](#) system control value is selected; see *Converting Quotes to Orders*.

1. The system determines if the order is eligible for online authorization. In order to receive a credit card authorization during order entry:

- the [On-line Authorizations \(B89\)](#) system control value must be selected.
- the order type defined for the order must be eligible for online authorizations (the On-line authorization field is set to Window (on-line eligible and display window) or Without Window (on-line eligible and do not display window)).
- the order must have a credit card, stored value card, or debit (Switch) card payment method.
- the order must be in an open or suspended status. **Note:** You can authorize a credit card payment during order maintenance when the order is on hold; regardless of whether the payment is authorized, the order remains on hold.
- the arrival date on the order cannot be greater than the current date.

Express bill orders: When you enter a credit card payment method on an express bill order, you must manually authorize the card or the order must be eligible for online authorization. However, since you cannot enter the Authorization Request ID at this screen, Oracle recommends that you instead use the Add Authorization option from the Order Summary page in Modern View to apply a manual authorization.

See [Online Credit Card Authorization Setup](#) for more information on setting up the required values for online authorization.

2. The system determines the amount to authorize.

What Credit Card Amount is Sent for Authorization?

- If the [Online Auth Verification Only \(I96\)](#) system control value is selected, the system processes online authorizations for \$0.00 for the purpose of validating the card. During batch authorizations, the system authorizes the card for the shippable dollar amount and voids the online authorization for \$0.00.
- If the Online Auth Verification Only (I96) system control value is unselected, the system looks at the setting of the Authorize Full Amount During Order Entry (G99) system control value to determine the amount sent for authorization.

The Authorize Full Amount During Order Entry (G99) system control value determines if the credit card is authorized for the full order amount or for the shippable amount on the order.

Authorize full amount...	Authorize shippable amount...
The system sends the entire dollar amount defined for the credit card for authorization. If the credit card is the only payment method... The amount to authorize is the order total. The order total is the sum of all charges on the order, including: merchandise, freight, additional freight, tax, handling, additional charges, GST and PST.	The system sends the dollar amount associated with what is shippable on the order, across all ship to customers, for authorization. If the credit card is the only payment method... This shippable dollar amount includes: • shippable merchandise amount, including drop ship items • tax associated with the shippable merchandise amount • total freight • total additional freight • total order level additional charges Note: The system sends the total freight and total additional freight for authorization, regardless of whether you are prorating freight charges (the Prorate Freight Charges (D39) system control value is selected).
If the credit card is the catch-all payment method... The amount to authorize is the remaining dollar amount not associated with another payment method on the order. The system subtracts the amount applied to any other payment methods from the order total. order total - dollar amount associated with other payment methods = amount to authorize for this credit card	If the credit card is the catch-all payment method... The amount to authorize is the remaining shippable dollar amount not associated with another payment method on the order. The system subtracts the amount applied to any other payment methods from the shippable dollar amount. shippable dollar amount - dollar amount associated with other payment methods = amount to authorize for this credit card Excluded from authorizations: • order lines with a future arrival date • order lines on backorder, canceled, closed, or sold out • reserved order lines that are coordinate grouped with an order line on backorder or with an order line with a future arrival date

Excluded from authorizations:

- order lines with a future arrival date
- order lines on backorder, canceled, closed, or sold out
- reserved order lines that are coordinate grouped with an order line on backorder or with an order line with a future arrival date

Regardless of whether you are authorizing the full amount or the shippable amount...

Included in authorizations:

- express bill order lines
- drop ship order lines
- non-inventory order lines

Deferred Billing

If the credit card on the order is associated with a deferred pay plan, the system:

- sends an authorization for \$1.00 if the Authorize full amount field for the pay plan is unselected.
- sends an authorization for the dollar amount available for authorization if the Authorize full amount field for the pay plan is selected.

Installment Billing

If the credit card on the order is associated with an installment pay plan, the system:

- sends an authorization for the first installment amount if the Authorize full amount field for the pay plan is unselected.
- sends an authorization for the dollar amount available for authorization if the Authorize full amount field for the pay plan is selected.

If more than one credit card is sent for authorization:

The system sends for authorization the credit card defined with a dollar amount, then sends the catch-all credit card for authorization.

Credit cards requiring authorizations less than \$1.00: If the credit card amount to authorize is less than \$1.00 and you have defined an authorization number in the [Authorization Number for Authorizations Under \\$1.00 \(I08\)](#) system control value, the system does not send the credit card to the account provider for authorization and instead assigns the authorization number from the system control value to the credit card. If an authorization number is not defined in this system control value, the system sends the credit card to the account provider for authorization, regardless of the amount that requires authorization.

3. The system sends the authorization amount to the account provider. If there is an amount to authorize for the credit card, the system sends an authorization request in online format to the account provider.

4. The account provider sends back a response. The account provider sends an authorization response to Order Administration.

There are 3 types of responses you can receive from the account provider.

- R = an authorization response is received, such as declined or approved
- T = the program timed out before an authorization response was received
- U = an undefined response

Additionally, if an authorization response is received, the account provider sends back an authorization response code, AVS response code (if performing address verification), CID response code (if performing credit card identification verification), authorization code, and date.

Vendor response settings: If a pop up window message has been defined for the vendor response received, the system displays the [Select Authorization Response Option Window](#). Also, if a hold reason code has been defined for the vendor response received, the system places the order on hold.

Oracle Retail Customer Engagement stored value cards: When using the [Customer Engagement Stored Value Card Integration](#), if the Oracle Retail Customer Engagement stored value card is the only payment on the order and the amount authorized for the card is less than the order total, Order Administration updates the amount for the card with the amount authorized and displays the message Insufficient balance on card - please add another payment. In order to accept the order, you must add another payment to the order to cover the amount of the order that is not covered by the Oracle Retail Customer Engagement stored value card. Example: If the order total is 500.00 and the amount authorized for the Oracle Retail Customer Engagement stored value card is 236.20, the system updates the amount for

the card to 236.20 and requires another form of payment to cover the remaining 289.55 balance on the order.

Hierarchy for Placing the Credit Card On Hold

The credit card pay type may be placed on hold if the credit card is not approved, the AVS verification fails, or the CID verification fails.

The system uses this hierarchy to determine if the credit card pay type should go on hold:

- Authorization response has a hold reason defined: If the credit card charge is declined (not authorized), the credit card may be placed on hold (based on the value in the Hold reason field in the Vendor Response table). The order header is also placed on AT (declined credit card) hold. You must take the order header and credit card pay type off of hold through [Manage Held Orders](#) in Modern View and resend for authorization or cancel the order.
- AVS response has a hold reason defined: If the credit card charge is approved (authorized) but the credit card fails the address verification check, the authorization may be placed on hold (based on the value in the Hold reason field in the Vendor Response table). The order header is also placed on AT (declined credit card) hold. You must contact the customer and obtain correct address information, then take the order header and credit card pay type off of hold through [Manage Held Orders](#) in Modern View and resend for authorization or cancel the order.
- Card security identification response has a hold reason defined: If the credit card charge is approved (authorized) and passes the address verification check, but the credit card fails the credit card security identification check, the credit card pay type may be placed on hold (based on the value in the Hold reason field in the Vendor Response table). The order header is also placed on AT (declined credit card) hold. You must contact the customer to verify credit card ownership, then take the order header and credit card pay type off of hold through [Manage Held Orders](#) in Modern View and resend for authorization or cancel the order.

For more information: See [Defining Vendor Response Codes](#) and [Establishing Cancel Reason Codes \(WCNR\)](#).

What Happens When a Credit Card is Approved?

When a credit card is approved during order entry, the system:

- [Select Authorization Response Option Window](#)
- places the order on hold if a hold reason code has been defined for the vendor response. Typically, if an authorization is approved, the order is not placed on hold. However, if the credit card is approved but fails address verification or card identification verification, you may want to place the order on hold.
- once you accept the order, you return to the [Select Customer Sold To For Order Screen](#), or the [Customer Selection Screen](#) if you are a CTI user.
- processes any end-of-order updates and sends the order to the Order Async.
- creates a record in the On-Line Authorization table indicating the order number, that the credit card has been approved, the dollar amount authorized, the transaction sequence number, and the authorization number. The status for this authorization is *UPDT, indicating the online authorization has completed.
- creates a record in the Authorization History table indicating the credit card has been approved, the authorization number, the date the credit card was authorized, and the dollar amount authorized. If you reject an order after the credit card has been approved, the

system removes the record in the Authorization History table. You can review authorization history at the [Display Authorization History Screen](#).

- creates a record in the Void Authorization table indicating the order number and the dollar amount eligible for void. If you reject an order after the credit card has been approved, the system removes the record from the Void Authorization table.

AVS response: If the credit card charge is approved (authorized) but the order fails the address verification check and receives an AVS response that has a hold reason code, the system:

- places the order on AT hold.
- places the credit card payment method on the order on AV (AVS) hold.
- creates an order transaction history message indicating the credit card was declined: SYS HLD - DECLINED CREDIT CARD.
- updates the record in the On-Line Authorization table indicating the credit card failed AVS. The OLA AVS result field is updated with the AVS response received from the account provider. You can review the response at the [Authorization History Details Window](#).
- updates the record in the Authorization History table indicating the credit card failed AVS. The AUH status field is updated to O (authorized but not used) and the AVS response field is updated with the AVS response received from the account provider. You can review the status of the credit card and the AVS response at the [Authorization History Details Window](#).

You must contact the customer and obtain correct address information, then take the order off of hold through the Release Held Orders function and resend for authorization.

If the authorization has not yet expired and the transaction passes AVS, the system updates the credit card authorization record from an O (authorized but not used) status to an A (approved) status. If the authorization has expired, the system updates the credit card authorization record from an O (authorized but not used) status to a D (declined) status and resends the credit card for authorization and address verification.

Card security identification response: If the credit card charge is approved (authorized) but the order fails the credit card security check and receives a card security identification response (CID, CVV2, CVC2) that has a hold reason code, the system:

- places the order on AT hold.
- places the credit card payment method on the order on CF (credit card fraud) hold.
- creates an order transaction history message indicating the credit card was declined: SYS HLD - DECLINED CREDIT CARD.
- updates the record in the On-Line Authorization table indicating the credit card failed card security. The OLA vendor response 2 field is updated with the card security response received from the account provider. You can review the response at the [Authorization History Details Window](#).
- updates the record in the Authorization History table indicating the credit card failed card security. The AUH status field is updated to O (authorized but not used) and the Vendor response 2 field is updated with the card security response received from the account provider. You can review the status of the credit card and the card security response at the [Authorization History Details Window](#).

You must contact the customer to verify credit card ownership, then take the order off of hold through [Manage Held Orders](#) in Modern View and resend for authorization.

If the authorization has not yet expired and the transaction passes card security identification, the system updates the credit card authorization record from an O (authorized but not used)

status to an A (approved) status. If the authorization has expired, the system updates the credit card authorization record from an O (authorized but not used) status to a D (declined) status and resends the credit card for authorization and card security identification.

Voiding an online authorization: After receiving an online authorization, if you change the price of an item in Order Maintenance, the system voids the authorization. Because the authorization is voided, the system sends the order for batch authorization during pick slip generation.

What Happens When a Credit Card is Declined?

When a credit card is declined during order entry, the system:

- displays the [Select Authorization Response Option Window](#) if a vendor response pop up window message has been defined, the On-line authorization field for the order type is set to Window (on-line eligible and display window), and a Response time is defined for the account provider. The message should indicate the credit card has been declined and any action you should take to correct the decline or inform the customer. From this window, you can accept the order or return to the order to make any corrections.
- places the order on hold: If a hold reason code is defined for the vendor response, the system assigns this hold reason code to the order payment method and places the order header on AT (Declined Credit Card) hold. If the response received is not defined for the account provider, the system places the order payment method on AV (Invalid Response Code) hold.
- once you accept the order you return to the [Select Customer Sold To For Order Screen](#), or the [Customer Selection Screen](#) if you are a CTI user.
- processes any end-of-order updates and sends the order to the Order Async.
- creates a record in the On-Line Authorization table indicating the order number, that the credit card has been declined, the dollar amount submitted for authorization, and the transaction sequence number. The status of this authorization is *UPDT, indicating the online authorization has been completed.
- creates a record in the Authorization History table indicating the credit card has been declined, the reason why the credit card was declined, the date the credit card was declined, and the dollar amount submitted for authorization. If you reject the order after the credit card has been declined, the system removes the record from the Authorization History table. You can review authorization history at the [Display Authorization History Screen](#).

You can send the credit card up for authorization again during order maintenance, using the [Performing Batch Authorization \(SATH\)](#) menu option, or during pick slip generation if the Batch/on-line field for the account provider contains a C (on-line and batch authorizations).

When Communication Failures Occur

Communication failures can occur if the system times out before a response is received. If communication failures occur and you do not receive a response from the account provider, the system:

- does not display the [Select Authorization Response Option Window](#) since a vendor response was not received.
- accepts the order and returns you to the [Select Customer Sold To For Order Screen](#), or the [Customer Selection Screen](#) if you are a CTI user.
- processes any end-of-order updates and sends the order to the Order Async.
- creates a record in the On-Line Authorization table. The status of this authorization is:
- RDY, indicating online authorization has not been performed.

- SENT, indicating the online authorization transmission failed after the credit card was sent to the account provider for authorization.
- RCVD, indicating the online authorization transmission failed after a response was received from the account provider, but final updates could not be completed. This may occur if the Online Authorization integration job became inactive. The authorization does not complete processing until the job is active. Once the Online Authorization integration job is active, the system updates the status of the authorization to *UPDT.
- creates a record in the Authorization History table indicating the credit card is waiting for authorization, the date the credit card was sent for authorization, and the dollar amount waiting for authorization.

The amount of time the system waits for an authorization is defined in the Response time field for the account provider.

Grace period: The system allows a 2 day grace period to receive a response from the account provider if the status of the authorization is *RDY, *SENT, or *RCVD. To determine the grace period, the system takes the current date - the authorization sent date to determine the number of days. Once the 2 day grace period is passed, the system declines the transmission. You will need to resend the credit card for authorization during order maintenance or pick slip generation.

What Happens When an Undefined Response is Returned?

When an undefined response is returned, the system:

- does not display the [Select Authorization Response Option Window](#) since this vendor response has not been defined for the account provider.
- places the order on AVS hold.
- accepts the order and returns you to the [Select Customer Sold To For Order Screen](#), or the [Customer Selection Screen](#) if you are a CTI user.
- processes any end-of-order updates and sends the order to the Order Async.
- creates a record in the On-Line Authorization table indicating the order number, that the credit card is waiting for authorization, the dollar amount waiting for authorization, and the transaction sequence number. The status of this authorization is *RDY, indicating online authorization has not been performed.
- creates a record in the Authorization History table indicating the credit card is waiting for authorization, the date the credit card was sent for authorization, and the dollar amount waiting for authorization.

You can resend the order for authorization during order maintenance, using the Performing Batch Authorization (SATH) menu option, or during pick slip generation if the Batch/on-line field for the account provider contains a C (on-line and batch authorizations).

Select Authorization Response Option Window

Use this window to review the response received from the account provider and any messages defined for this vendor response.

Once you review the message, you can accept the order or return to the order to make any corrections or reject the order.

Typically, a vendor response pop up window message is defined for a vendor response indicating a declined authorization, declined address verification, or declined card identification verification.

How to display this screen: This window displays when you select Accept to accept an order in order entry if:

- the dollar amount defined for the credit card payment method on the order was sent up for authorization and received a response, and
- the On-line authorization field for the order type on the order is set to Window (on-line eligible and display window), and
- a Response time is defined for the account provider, and
- the Pop up window messages field for the vendor response returned by the account provider contains text.

**Note:**

The Pop up window messages # 1 field must contain text in order to display this window. If you define text in the Pop up window messages # 2 - # 4 fields and not in the Pop up window messages # 1 field, this window will not display.

This window displays for each credit card payment method on the order that is sent up for authorization and meets the criteria above.

What message displays? You can receive a response from the account provider for the authorization, address verification (AVS), and credit card security identification (CID, CVV2, CVC2). If you receive a response for the authorization, AVS verification, and card security identification, the system uses the following hierarchy to determine the pop up window message that displays in the Select Authorization Response Option window:

- Authorization response has a message defined: the message associated with the authorization response displays in the Select Authorization Response Option window.
- AVS response has a message defined: if the authorization response does not have a message defined, the message associated with the AVS response displays in the Select Authorization Option window.
- Card security identification response has a message defined: if the authorization response and AVS response do not have a message defined, the message associated with the card security response displays in the Select Authorization Option window.

Batch order entry: This window does not display if you are performing online credit card authorization during batch order entry.

Order maintenance: The Select Authorization Response Option window displays if you are performing online credit card authorization during order maintenance. You can authorize a credit card during order maintenance by selecting On-line Auth for a credit card payment method.

Field	Description
Order #	The order number containing the credit card payment method that received this authorization response. Numeric, 8 positions; display-only.
Pay type	The description of the credit card payment method that received the authorization response containing this message text. Alphanumeric, 30 positions; display-only.

Field	Description
Credit card #	The credit card number defined for the credit card payment method used on the order. Information will be provided by Oracle at a later date. Alphanumeric, 20 positions; display-only.
Exp date (credit card expiration date)	The date this credit card is no longer valid. Numeric, 4 positions (MMYY format); display-only.
Auth amt	The amount sent for authorization for this credit card. If this credit card was the catch all payment method on the order or the only payment method on the order, this field is blank. Numeric, 13 positions with a 2-place decimal; display-only.
Vendor response pop up window messages # 1 - # 4	The message text from the Pop up window messages # 1 - # 4 fields for the vendor response you received from the account provider. This message text should indicate whether the credit card has been approved or declined and any action that you should take to correct any problems and inform the customer. Alphanumeric, four 40-position fields; display-only.

Screen Option	Procedure
Accept the order	Select Accept Order. The system returns you to the Select Customer Sold To For Order Screen or the Customer Selection Screen if the operator placing the order is a CTI user, and processes the order through the Order Async.
Return to the order to make any corrections or reject the order	Select Edit Order. The system returns you to the Work with Order/Recap Screen or the Enter Payment Method Screen where you can make any corrections or reject the order.

Resending Credit Cards for Authorization

If you did not receive a response from the account provider during order entry or the credit card was declined in order entry, you can resend the credit card for authorization:

- selecting On-line Auth for the credit card at the [Enter Payment Methods Screen in Order Maintenance](#) in order maintenance. The system sends the credit card for authorization, waits for a response as in order entry, and displays the [Select Authorization Response Option Window](#) if pop up window message text was defined for the vendor response.
- using the Performing Batch Authorization (SATH) menu option. This menu option allows you to send credit cards associated with a selected ship via for authorization.
- during pick slip generation if the Batch/on-line field for the account provider contains a C (on-line and batch authorizations).

Pick Slip Generation

You can generate pick slips for orders that contain pre-paid payment methods, such as cash or check, and/or credit cards that have received an approved authorization by selecting the Preauthorized orders only field in the pick generation template.

If you try to generate pick slips for orders that contain credit cards that have not been authorized with the Preauthorized orders only field selected and the [Use Auto Authorization Interface \(C14\)](#) system control value selected, the system will not send the credit cards up for authorization and will not generate pick slips.

**Note:**

If you generate pick slips for preauthorized orders only and records exist in the Authorization History table in an S (sent) status, the system updates the records to a D (decline) status. The next time you generate pick slips with the Preauthorized orders only field unselected, the system sends orders associated with records in the Authorization History table in a D status up for authorization.

Receiving authorizations during pick slip generation: If the credit card has not yet received an approved authorization, you can resend the credit card for authorization during pick slip generation if the Preauthorized orders only field in the pick generation template is unselected and the Batch/on-line field for the account provider is set to C (batch and on-line authorization). See [Authorizations During Pick Slip Generation](#) for more information on receiving authorizations during pick slip generation.

[Authorization Listing Screen](#)

Credit Card Authorization List

The [Online Credit Card Authorization Listing](#) is a report you can use to review credit cards that have been authorized, declined, or sent for authorization for a specific date range.

You can generate this report by:

- defining selection criteria at the and selecting Accept.
- sending credit cards for authorization using the Performing Batch Authorization (SATH) menu option.

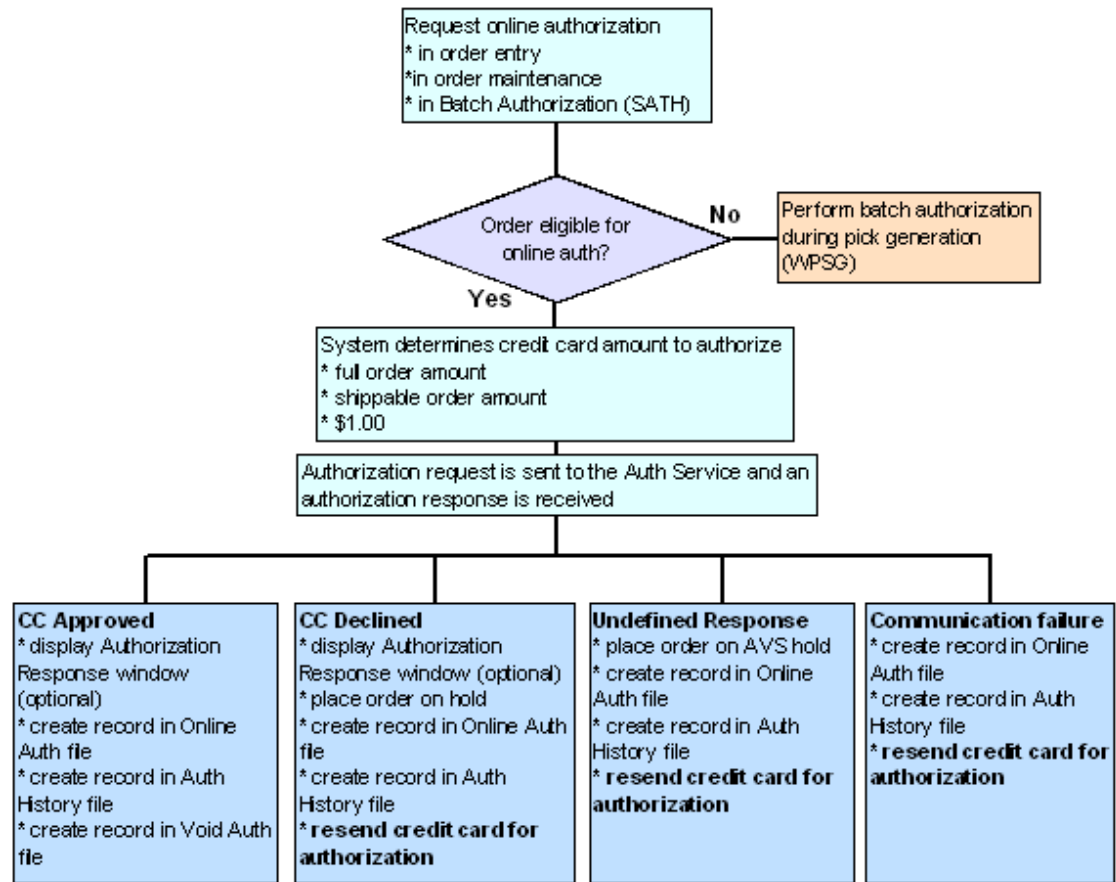
**Note:**

The system generates a similar report when you authorize credit cards during pick slip generation; see [Online Credit Card Authorization Listing](#).

Transmitting and Receiving Deposits

After you obtain an authorization for a credit card charge, you can generate a pick slip for the order, ship the order to the customer, and charge the credit card for the shipment. At this point, you use [Processing Auto Deposits \(SDEP\)](#) to transmit the deposit information to a deposit service for settlement.

Online Authorization Process



Online Credit Card Authorization Setup

Purpose: Before you can receive online credit card authorizations in your company, you must perform the necessary setup. Information requiring creation and setup includes:

- [System Control Values](#)
- [Number Assignment Value](#)
- [Account Provider Settings](#), including response codes and currency codes
- [Order Types](#) eligible for online credit card authorization
- credit card [Pay Types](#)
- [Pick Slip Generation](#)

System Control Values

System Control Value	Description
On-line Authorizations (B89)	Select this field to indicate you will be performing online credit card authorizations. If this field is unselected, you will not be able to authorize credit cards in order entry or order maintenance.

System Control Value	Description
Authorize Full Amount During Order Entry (G99)	Select this field to indicate you will send an order up for authorization for the full order amount. Deselect this field to indicate you will send an order up for authorization for the shippable order amount.
Online Auth Verification Only (I96)	Select this field to indicate you want the system to process online authorizations for \$0.00 for the purpose of validating the card. During batch authorizations, the system authorizes the card for the shippable dollar amount and voids the online authorization for \$0.00. If this field is unselected, the system looks at the Authorize Full Amount During Order Entry (G99) system control value to determine the amount sent for authorization.

Number Assignment Value

The number assignment Transaction Sequence # assigns the next available number to the credit card authorization.

Account Provider Settings

- When you are setting up a account provider to support online authorization, please note these required settings:
- Industry code: enter your DBA number.
- Batch/on-line: set to I (on-line) to perform only online credit card authorizations; set to C (on-line or batch) to perform both online credit card authorizations and batch credit card authorizations.
- Response time: set the number of seconds the system waits to receive a response from the account provider before continuing to process the order.
- Pay type cross reference (Paytypes at the [Work with Authorization Services Screen](#)): Create a cross-reference for each pay type code for which you wish to receive online credit card authorization, using the vendor pay code information supplied by the account provider.
- Currency cross reference (Currency at the [Work with Authorization Services Screen](#)): Create a cross-reference for each currency code you will use on orders receiving online credit card authorizations, using the vendor currency code information supplied by the account provider.
- Vendor responses (Responses at the [Work with Authorization Services Screen](#)): Optionally, you can define Vendor response pop up window messages. The messages display in a pop up window in order entry when a credit card that was sent up for authorization is declined. You can enter up to four 40-position lines of message text. Set up vendor responses for authorizations, AVS (if you are performing address verification), and CID (if you are performing credit card identification).

Order Types

You define whether an order type is eligible for online authorizations and if the order type will display a window during order entry when a response is received from the account provider, based on the On-line authorization field:

- Window indicates the order type is eligible for online authorizations and the [Select Authorization Response Option Window](#) displays.

- Without Window indicates the order type is eligible for online authorization and the Select Authorization Response Option Window does not display.
- Not Eligible indicates the order type is not eligible for online authorization.

Online authorization for web orders: In order to perform online authorization when Order Administration receives the web order through the *Generic Order Interface (Order API)*, the Online Authorization setting for the order type on the web order must be set to Without Window.

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

Pay Types

Each credit card pay type eligible for online authorization should have the account provider set up as its authorization and deposit service. See [Working with Pay Types \(WPAY\)](#) for more information on setting up pay types.

Pick Slip Generation

If you wish to generate pick slips only for orders that contain pre-paid payment methods and/or credit cards that have received an authorization, you can create a pick slip generation template with the Preauthorized orders only field selected.

Processing Authorizations and Deposits Using Point-to-Point Communication

Purpose: Processing authorizations and deposits using point-to-point communication, allows you to post transactions directly to the account provider in the format required by the account provider.

Available Point-to-Point Integrations

Integration	See:
Oracle Retail Customer Engagement Stored Value Card integration: Allows you to process the stored value card transactions between Order Administration and Oracle Retail Customer Engagement in Oracle Retail Customer Engagement's message format.	Customer Engagement Stored Value Card Integration for an overview and more information on the Oracle Retail Customer Engagement messages used to process stored value card transactions between Order Administration and the Oracle Retail Customer Engagement system using point-to-point communication.

For more information: See:

- [Stored Value Card Integration](#) for more information on how to process stored value card transactions.
- [Processing Auto Deposits \(SDEP\)](#) for more information on deposit processing in Order Administration.

PayPal Direct Connection Integration

Purpose: The PayPal Direct Connection integration enables you to use PayPal as a method of payment on web orders.

- The web storefront sends the PayPal payment on the order directly to PayPal for authorization. The order must receive an approved authorization on the web storefront before it is sent to Order Administration for processing.
- During pick slip generation, Order Administration verifies that the amount required to generate the pick slip is covered by the authorization received for the PayPal payment during web storefront processing. If the amount is not covered, the system places the order on Credit Card Decline hold and the PayPal payment on PayPal Decline hold.
- During deposit processing, Order Administration sends the deposit transaction directly to PayPal for confirmation and settlement.
- When an order is canceled or the PayPal payment method deactivated, Order Administration sends an authorization reversal request to PayPal.

PayPal is an e-commerce business that allows you to perform payment and money transfers securely over the Internet. PayPal's service builds on the existing financial infrastructure of bank accounts and credit cards and utilizes fraud prevention systems to create a safe, global, real-time payment solution.

**Note:**

PayPal is a registered trademark

The Order Administration PayPal Direct Connection integration allows you to use PayPal as a form of payment on web orders and send the deposit transactions directly to PayPal.

**Note:**

Because the PayPal Direct Connection Integration does not send authorization transactions between Order Administration and PayPal, web orders containing a PayPal payment must receive an approved authorization on the web storefront before being sent to Order Administration for processing. In addition, you can only use PayPal as a form of payment on web orders. The Order Administration PayPal Direct Connection integration does not support PayPal as a form of payment on non-web orders.

In this topic: This topic provides an overview of the PayPal Direct Connection integration and the required setup.

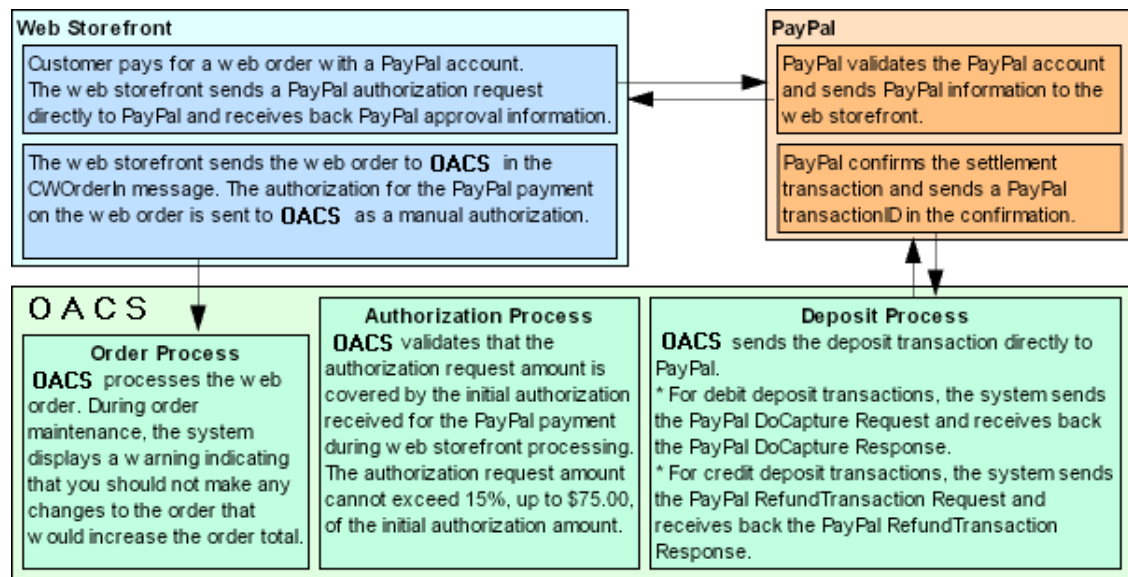
- [PayPal Direct Connection Integration Process](#)
- [Processing Orders Containing a PayPal Payment](#)
 - [Validating a Web Order that Contains a PayPal Payment](#)
 - [Maintaining a PayPal Order](#)
 - [Applying Refunds Across Multiple Capture Transaction IDs](#)
- [Processing Authorizations for a PayPal Order](#)
 - [PayPal Authorization Processing](#)
 - [Approved PayPal Authorizations](#)
 - [Declined PayPal Authorizations](#)

- Processing Deposits for a PayPal Order
 - PayPal Deposit Processing
 - Approved PayPal Deposits
 - Failed PayPal Deposits
- Purchase Deposit Transactions
 - PayPal DoCapture Request
 - PayPal DoCapture Response
- Return Deposit Transactions
 - PayPal RefundTransaction Request
 - PayPal RefundTransaction Response
- PayPal Authorization Reversals
 - PayPal DoVoid Transaction Request
 - PayPal DoVoid Transaction Response
- PayPal Direct Connection Integration Restrictions
- PayPal Direct Connection Integration Troubleshooting
 - PayPal Log
- PayPal Direct Connection Integration Setup
 - Creating the PayPal Decline Order Hold Reason
 - Creating the PPL (PayPal) Account Provider
 - Creating a PayPal Pay Type

PayPal Direct Connection Integration Process

- Processing Orders Containing a PayPal Payment
 - Validating a Web Order that Contains a PayPal Payment
 - Maintaining a PayPal Order
- Processing Authorizations for a PayPal Order
- Processing Deposits for a PayPal Order

PayPal Direct Connection integration illustration:



Processing Orders Containing a PayPal Payment

When a customer places an order on the web storefront and pays for the order using a PayPal account:

- The web storefront sends an authorization request for the PayPal payment directly to PayPal.
- PayPal validates the PayPal account number that is passed in the authorization request and sends PayPal confirmation information back to the web storefront.
- The web storefront completes the order and sends the order to Order Administration in the *Inbound Order XML Message (CWORDERIN)*.

Web orders containing a PayPal payment that has been authorized by PayPal contain the following information in the *Inbound Order XML Message (CWORDERIN)*. The authorization for the PayPal payment is sent to Order Administration as a manual authorization.

For more information see the Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

- Regular order information
- PayPal pay type passed in the payment_type field
- PayPal transaction ID passed in the cc_number field
- Approved PayPal payment:
 - auth_amount
 - auth_number (this is the first 16 positions of the PayPal transaction ID)
 - auth_date (this is the date the PayPal payment was authorized with PayPal)

Validating a Web Order that Contains a PayPal Payment

Because the PayPal Direct Connection Integration does not send authorization transactions between Order Administration and PayPal, web orders containing a PayPal payment must receive an approved authorization on the web storefront before being sent to Order Administration for processing.

If Order Administration receives a web order that contains a PayPal payment that has not yet received an approved authorization, the system will accept the order; however, the PayPal

payment will fail batch authorization and you will not be able to generate a pick slip for the order. See [Processing Authorizations for a PayPal Order](#).

Maintaining a PayPal Order

When you advance to an order in order maintenance that contains a pay type with PPL (PayPal) defined as the authorization service and deposit service, the system displays the [PayPal Warning Window](#) indicating that you should not make any changes to the order that would increase the order total. When you generate a pick slip for an order that contains a PayPal payment, the system validates that the amount required to generate the pick slip does not exceed 15% or \$75.00 of the initial authorization amount that was received from PayPal during web storefront processing.

Examples:

- If the authorization received from PayPal during web storefront processing is \$100.00, you can increase the order total up to \$115.00 ($\$100.00 + 15\% = \$115.00$) and still process the order without any problems. However, once you exceed \$115.00, the PayPal payment will fail batch authorization and the system will not generate a pick slip or perform drop ship processing for the order.
- If the authorization received from PayPal during web storefront processing is \$600.00, you can increase the order total up to \$675.00 and still process the order without any problems. However, once you exceed \$675.00, the PayPal payment will fail batch authorization and the system will not generate a pick slip or perform drop ship processing for the order. Note: The system does not allow you to increase the order total by 15% ($\$600.00 + 15\% = \$690.00$) because it would exceed \$75.00 of the initial authorization amount that was received from PayPal during web storefront processing.

Reversals? The system submits a reversal to PayPal if:

- The entire order is canceled or sold out, or;
- The payment method is deactivated before any transactions are billed.

The system does not submit a reversal to PayPal for a partial amount, such as when:

- A single item on a multi-line order is canceled or sold out.
- A single unit on an order line is canceled or sold out.
- Any items remaining on the order are canceled after a shipment has taken place.

Also, the reversal is not submitted if any of the order lines have been submitted to Order Orchestration for fulfillment.

For more information: See [Stored Value Card Authorization Reversal](#).

Applying Refunds Across Multiple Capture Transaction IDs

PayPal cannot process a refund that exceeds the amount of the initial deposit. For example, if an order includes two deposits of \$25.00, PayPal requires that any single refund processed not exceed \$25.00.

In order to be able to reconcile refunds against the initial deposits, Order Administration stores the [TRANSACTIONID](#) provided by PayPal for each deposit as the Capture Transaction ID in the Credit Card Deposit History table for each successful deposit with PayPal, so that each refund amount applies to a deposit amount.

Example: You process an order in two shipments:

- Shipment 1: \$50.00

- Shipment 2: \$40.00

During deposit processing, the capture transaction ID for each shipment is stored in the Credit Card Deposit History table. This ID is not displayed on any screen.

If you then need to process one or more refunds against the order, Order Administration uses the capture transaction IDs to reconcile the refund amounts. It uses the capture transaction ID that matches the refund amount, if any; otherwise, it uses the capture transaction ID for the lowest total shipment that exceeds the refund amount. For example:

- If the refund amount is \$40.00: Use the capture transaction ID for shipment 2, because the amount matches this shipment.
- If the refund amount is \$50.00: Use the capture transaction ID for shipment 1, because the amount matches this shipment.
- If the refund amount is \$45.00: Use the capture transaction ID for shipment 1 (because \$45.00 is more than the amount for shipment 2).
- If the refund amount is \$25.00: Use the capture transaction ID for shipment 1 (because \$25.00 does not match the amount of either deposit).
- If the refund amount is more than \$50.00: Split the refund across both capture transaction IDs.

Sometimes multiple capture transaction ID are used for a refund deposit, because no single transaction is large enough to cover the refund. In these cases, the [Display Order Payment History Screen](#) indicates the number of deposits used for the total refund amount. For example, if you process a refund totaling \$60.00 for an order with the two shipments, one for \$50.00 and another for \$25.00, the Display Order Payment History screen indicates:

- Partial Deposit confirmed \$50.00-
- Partial Deposit confirmed \$10.00-
- Deposit split into 2 separate deposits.
- Deposit confirmed \$60.00-

**Note:**

These messages are not displayed at the Payment Method Details panel in Contact Center (Modern View Order Summary), although the purchase and deposit amounts are displayed.

In this situation, there is also an Order Transaction History message written, for example: Refund for inv# 1234 exceeds PayPal limit. Note that the message may be truncated based on the size of the invoice number.

Multiple refunds? Order Administration tracks the total returned amount for PayPal payment methods in order to ensure that subsequent refunds do not result in overusing any individual deposit amounts. For example, if there was a deposit for \$50.00 and a deposit of \$10.00, and there is already a refund amount of \$40.00 applied to the first deposit, leaving \$10.00 unrefunded, a subsequent refund of \$15.00 would be split across the two deposits.

If the deposit fails: When the deposit is not initially processed successfully and you use [Manage Rejected Deposits](#) in Modern View instead, no capture transaction ID is recorded, so a refund cannot be applied to the deposit.

**Note:**

Deposits processed before update 20.0 will not have a capture transaction ID, so the process described above does not apply to these deposits.

Processing Authorizations for a PayPal Order

The system calls authorization processing when you generate a pick slip or perform drop ship processing for an order that contains a pay type with PPL (PayPal) defined as the authorization service. During authorization processing for an order that contains a PayPal pay type, the system validates that the required authorization amount is covered by the initial authorization received for the PayPal payment during web storefront processing.

- [Approved PayPal Authorizations](#)
 - [Example: Approved PayPal Authorization](#)
 - [Example: Multiple Approved PayPal Authorizations](#)
 - [Example: Approved PayPal Authorization for Amount Within Allowed 15%](#)
 - [Example: Approved PayPal Authorization and Credit Card Authorization](#)
- [Declined PayPal Authorizations](#)
 - [Example: Declined PayPal Authorization for Amount Over 15%](#)
 - [Example: Declined PayPal Authorization for Amount Over \\$75.00](#)

**Note:**

Orders containing a PayPal payment should have received an authorization from PayPal on the web storefront before the order was received into Order Administration. The system does not send a PayPal payment to PayPal for authorization during pick slip generation or drop ship processing.

PayPal Authorization Processing

The system performs the following steps during PayPal authorization processing.

#	Step
1.	The system determines if a manual authorization exists for the PayPal payment on the order. • If a manual authorization does not exist for the PayPal payment on the order, the system declines the authorization. See Declined PayPal Authorizations for the updates that the system performs. • If a manual authorization exists for the PayPal payment on the order, the system determines if this is the first time authorization processing was called for the PayPal payment on the order.

#	Step
2.	If this is the first time authorization processing was called for the PayPal payment on the order, the system: - Creates an order history record indicating the manual authorization was detected. This record indicates: - The date when the order history record was created. - The first 16 positions of the PayPal transaction ID. - The amount that was manually authorized. This is the amount that was authorized by PayPal on the web storefront. - Creates an authorization history record for the manual authorization. This record indicates: - That the authorization was authorized. - The first 16 positions of the PayPal transaction ID in the Authorization # field. - The date the PayPal payment was authorized by PayPal on the web storefront. - The date the authorization expires. - The amount authorized for the PayPal payment. - The amount available to apply towards other authorization requests. This amount equals the amount authorized until the system approves an authorization request.

Order history record for manual authorization: The system creates an order history record for the authorization that was received from PayPal on the web storefront. For example:

Date	Type	Transaction Note	Amount	User
7/28/09	AUTH	MANUAL AUTH# DETECTED - O- AUTH_CODE	100.00	AUTH

Authorization history record for manual authorization: The system creates an approved authorization history record for the authorization that was received from PayPal on the web storefront. For example:

Status	Auth #	Auth Date	Auth Expires	Amt Submitted	Amt Available
Authorized	O- AUTH_CO DE	7/28/09	8/26/09	100.00	100.00

#	Step
3.	The system determines if the initial authorization has expired. The system uses the following calculation to determine the expiration date: authorization date from Authorization History table + Reauthorization days from Pay Type table = authorization expiration date For example, if the initial authorization date is 7/01/09 and the Reauthorization days is 29, the initial authorization expires on 7/29/09 (7/01/09 + 29 = 7/29/09). If the initial authorization has expired, the system declines the authorization. See Declined PayPal Authorizations for the updates that the system performs.

#	Step
4.	The system determines if the amount of the authorization request exceeds the manual authorization. The system allows the authorization request amount to be 15%, or up to \$75.00, over the initial authorization amount. For example: • If the manual authorization is for \$100.00, the authorization request cannot exceed \$115.00 ($\\$100.00 + 15\% = \\$115.00$). • If the manual authorization is for \$600.00, the authorization request cannot exceed \$675.00. The system does not allow an increase of 15% to the \$600.00 authorization because 15% of \$600.00 exceeds \$75.00 ($600.00 + 15\% = 690.00$). If the authorization request amount exceeds the initial authorization by 15% or \$75.00, the system declines the authorization. See Declined PayPal Authorizations for the updates that the system performs. Orders that Contain a Catch-All Credit Card Pay Type If the order contains a catch-all credit card pay type in addition to the PayPal pay type, instead of declining the PayPal authorization, the system adds the amount that exceeds the manual authorization to the catch-all credit card pay type on the order. In this situation, the system approves the PayPal authorization for the manual authorization amount and applies the amount not covered by the manual authorization to the catch-all credit card. For example, if the manual authorization for the PayPal pay type is \$100.00 and the order total is \$124.00, the system approves the PayPal authorization request for \$100.00 and applies \$24.00 towards the catch-all credit card on the order.
5.	If the amount of the authorization request is covered by the manual authorization or exceeds the manual authorization but is within the 15% or \$75.00 allowance, the system approves the authorization. If the approved authorization amount exceeds the manual authorization, the system creates a new authorization history record for the extra amount. This record indicates: • That the authorization was authorized. • The first 16 positions of the PayPal transaction ID in the Authorization # field. • The date the PayPal payment was authorized; this is the date the initial authorization was received from PayPal. • The date the authorization expires. • The extra amount authorized for the PayPal payment. See Approved PayPal Authorizations for the updates that the system performs.

Approved PayPal Authorizations

If the authorization received for the PayPal payment during web storefront processing covers the amount in the authorization request, the system:

- Generates a pick slip or performs drop ship processing for the order.
- Decreases the Amount available for the initial authorization history record by the authorization request amount. For example, if the initial authorization amount received on the web storefront is \$100.00, and the authorization request amount is \$28.00, the remaining amount available on the initial authorization is \$72.00.
- If the authorization request amount exceeds the manual authorization received for the PayPal payment, but is within the 15% or \$75.00 allowance, the system creates a new authorization history record for the extra amount.

Updated authorization history record for manual authorization:

Status	Auth #	Auth Date	Auth Expires	Amt Submitted	Amt Available
Authorized	O-AUTH_CODE	7/28/09	8/26/09	100.00	72.00

New authorization history record for the amount not covered by the manual authorization but within the 15% or \$75.00 allowance:

Status	Auth #	Auth Date	Auth Expires	Amt Submitted	Amt Available
Authorized	O-AUTH_CODE	7/28/09	8/26/09	12.00	.00

Example: Approved PayPal Authorization

A customer places an order on the web storefront and uses PayPal as the form of payment. The order total is \$100.00 and PayPal authorizes the payment for \$100.00. The web storefront sends the order to Order Administration with a manual authorization for the PayPal payment:

- cc_name = PAYPAL
- cc_number = O-CC_NUMBER (this is the PayPal transaction ID)
- auth_amount = 100.00
- auth_number = O-AUTH_CODE (this is the first 16 positions of the PayPal transaction ID)
- auth_date = 06262009

Order Administration receives and processes the order. Based on the Reauthorization days defined for the PayPal pay type, the PayPal payment does not expire until 29 days from the authorization date.

You generate a pick slip for the entire order. The authorization amount required to generate a pick slip for the order is \$100.00. Because the unused authorization amount of \$100.00 covers the amount required to generate a pick slip for the order, the system:

- Generates the pick slip.
- Creates an order history record:

Date	Type	Transaction Note	Amount	User
6/26/09	AUTH	MANUAL AUTH# DETECTED - O-AUTH_CODE	100.00	AUTH

- Creates an authorization history record for the PayPal payment on the order.

Status	Auth #	Auth Date	Auth Expires	Amt Submitted	Amt Available
Authorized	O-AUTH_CODE	6/26/09	7/25/09	100.00	.00

Example: Multiple Approved PayPal Authorizations

A customer places an order on the web storefront and uses PayPal as the form of payment. The order total is \$100.00 and PayPal approves the payment for \$100.00. The web storefront sends the order to Order Administration with a manual authorization for the PayPal payment:

- cc_name = PAYPAL
- cc_number = O-AUTH_CODE (this is the PayPal transaction ID)
- auth_amount = 100.00
- auth_number = O-AUTH_CODE (this is the first 16 positions of the PayPal transaction ID)
- auth_date = 06262009

Order Administration receives and processes the order. Based on the Reauthorization days defined for the PayPal pay type, the PayPal payment does not expire until 29 days from the authorization date.

You generate a pick slip for part of the order. The authorization amount required to generate a pick slip for the order is \$42.00. Because the unused authorization amount of \$100.00 covers the amount required to generate a pick slip for the order, the system:

- Generates the pick slip.
- Creates an order history record:

Date	Type	Transaction Note	Amount	User
6/26/09	AUTH	MANUAL AUTH# DETECTED - O- AUTH_CODE	100.00	AUTH

Creates an authorization history record.

Status	Auth #	Auth Date	Auth Expires	Amt Submitted	Amt Available
Authorized	O- AUTH_CODE	6/26/09	7/25/09	100.00	58.00

You generate a pick slip for the remainder of the order. The authorization amount required to generate a pick slip for the order is \$58.00. Because the unused authorization amount of \$58.00 covers the amount required to generate a pick slip for the order, the system:

- Generates the pick slip.
- Updates the authorization history record.

Status	Auth #	Auth Date	Auth Expires	Amt Submitted	Amt Available
Authorized	O-AUTH_CODE	6/26/09	7/25/09	58.00	0.00

Example: Approved PayPal Authorization for Amount Within Allowed 15%

A customer places an order on the web storefront and uses PayPal as the form of payment. The order total is \$100.00 and PayPal approves the payment for \$100.00. The web storefront sends the order to Order Administration with a manual authorization for the PayPal payment:

- cc_name = PAYPAL
- cc_number = O-AUTH_CODE (this is the PayPal transaction ID)

- `auth_amount = 100.00`
- `auth_number = O-AUTH_CODE` (this is the first 16 positions of the PayPal transaction ID)
- `auth_date = 06262009`

Order Administration receives and processes the order. Based on the Reauthorization days defined for the PayPal pay type, the PayPal payment does not expire until 29 days from the authorization date.

You maintain the order and as a result the order total increases to \$110.50.

You generate a pick slip for the entire order. The authorization amount required to generate a pick slip for the order is \$110.50. Because the required authorization amount is within 15% of the unused authorization amount of \$100.00, the system:

- Generates the pick slip.
- Creates an order history record:

Date	Type	Transaction Note	Amount	User
6/27/09	AUTH	MANUAL AUTH# DETECTED - O- AUTH_CODE	100.00	AUTH

Creates authorization history records:

- One authorization history record for the original authorization amount received from PayPal on the web storefront.
- One authorization history record for the amount that was over the original authorization amount, but within 15% of the original authorization amount.

Status	Auth #	Auth Date	Auth Expires	Amt Submitted	Amt Available
Authorized	O-AUTH_CODE	6/26/09	7/25/09	100.00	0.00
Authorized	O-AUTH_CODE	6/26/09	7/25/09	10.50	0.00

Example: Approved PayPal Authorization and Credit Card Authorization

Declined PayPal Authorizations

If the authorization received for the PayPal payment during web storefront processing does not cover the authorization request amount, the system places the order on hold and does not generate a pick slip or perform drop ship processing for the order.

The system declines the PayPal authorization for the following reasons:

- A manual authorization does not exist for the PayPal payment, or
- The initial authorization received from PayPal on the web storefront has expired, or
- The authorization request amount exceeds 15% of the initial authorization amount received from PayPal on the web storefront, or
- The authorization request amount exceeds \$75.00 of the initial authorization amount received from PayPal on the web storefront.

If the authorization received for the PayPal payment during web storefront processing cannot cover the authorization request amount, or a manual authorization for the PayPal payment does not exist, the system:

- Does not generate a pick slip or perform drop ship processing for the order.
- If the authorization was declined because the initial authorization has expired, the system updates the Amount available for the initial authorization history record to zero. For example:

Status	Auth #	Auth Date	Auth Expires	Amt Submitted	Amt Available
Authorized	O-AUTH_CODE	6/26/09	7/25/09 EXPIRED	100.00	.00

- If the authorization was declined because the initial authorization amount cannot cover the authorization request amount, the system does not update the initial authorization history record. For example:

Status	Auth #	Auth Date	Auth Expires	Amt Submitted	Amt Available
Authorized	O-AUTH_CODE	7/27/09	8/25/09	100.00	100.00

- Creates an authorization history record for the declined authorization amount. For example:

Status	Vendor Response	Auth #	Auth Date	Auth Expires	Amt Submitted	Amt Available
Declined	PPLDECLINE		7/27/09	8/25/09	39.00	.00

- Places the order on Declined Credit Card (AT) hold and the PayPal payment on the hold reason defined for the PPLDECLINE response code (typically PP PayPal Decline). Note:
- If the PPLDECLINE response code has not been set up for the PPL account provider, the system places the order on AV hold.
- If the PPLDECLINE response code exists, but a hold reason is not defined for the response code, the system does not place the order on hold, but does not generate a pick slip for the order since the initial authorization for the PayPal payment is not valid.
- Creates order history records indicating the authorization was declined and the order as put on hold. For example:

Date	Type	Transaction Note	Amount	User
7/27/09	PICKGEN	ORDER FLAGGED FOR CREDITCARD CANCELLATIO		USER
7/27/09	HOLD	SYS HLD - DECLINED CREDIT CARD	39.00	USER

Correcting PayPal authorization declines: If Order Administration declines the PayPal authorization request, you will need to correct the error by either:

- Maintaining the order and reducing the order total so that it does not exceed 15% or \$75.00 of the initial authorization amount received from PayPal on the web storefront.
- Calling the customer on the order to ask for an additional form of payment to cover the amount that exceeds the initial authorization amount received from PayPal on the web storefront.

- Canceling the order.

 Note:

Before you run pick slip generation or perform drop ship processing for the order again, make sure to remove the order from hold.

Example: Declined PayPal Authorization for Amount Over 15%

A customer places an order on the web storefront and uses PayPal as the form of payment. The order total is \$100.00 and PayPal approves the payment for \$100.00. The web storefront sends the order to Order Administration with a manual authorization for the PayPal payment:

- cc_name = PAYPAL
- cc_number = O-AUTH_CODE (this is the PayPal transaction ID)
- auth_amount = 100.00
- auth_number = O-AUTH_CODE (this is the first 16 positions of the PayPal transaction ID)
- auth_date = 06262009

Order Administration receives and processes the order. Based on the Reauthorization days defined for the PayPal pay type, the PayPal payment does not expire until 29 days from the current date.

You maintain the order and as a result the order total increases to \$122.50.

You generate a pick slip for the entire order. The authorization amount required to generate a pick slip for the order is \$122.50. Because the unused authorization amount of \$100.00 does not cover the amount required to generate a pick slip for the order, and the amount required exceeds 15% of the unused authorization, the system:

- Does not generate a pick slip.
- Declines the PayPal authorization.
- Places the order on Credit Card Decline (AT) hold and the PayPal payment on the hold reason defined for the PPLDECLINE response code.
- Creates order history records, indicating the PayPal authorization was declined:

Date	Type	Transaction Note	Amount	User
6/26/09	AUTH	MANUAL AUTH# DETECTED - O-42693038SP2401	100.00	AUTH
6/26/09	PICK GEN	ORDER FLAGGED FOR CREDITCARD CANCELLATIO		USER
6/26/09	HOLD	SYS HLD - DECLINED CREDIT CARD	22.50	USER

Creates authorization history records for the PayPal payment on the order, indicating the authorization was declined.

Status	Auth #	Auth Date	Auth Expires	Amt Submitted	Amt Available
Authorized	O-AUTH_CODE	6/26/09	7/25/09	100.00	100.00
Declined		6/26/09	7/25/09	22.50	0.00

The system allows you to generate a pick slip for the order if:

- You maintain the order and decrease the amount so that it does not exceed 15% of the unused PayPal authorization (\$115.00), or
- You maintain the order and apply the amount that exceeds 15% of the unused PayPal authorization towards another form of payment.

Example: Declined PayPal Authorization for Amount Over \$75.00

A customer places an order on the web storefront and uses PayPal as the form of payment. The order total is \$600.00 and PayPal approves the payment for \$600.00. The web storefront sends the order to Order Administration with a manual authorization for the PayPal payment:

- cc_name = PAYPAL
- cc_number = O-AUTH_CODE (this is the PayPal transaction ID)
- auth_amount = 600.00
- auth_number = O-AUTH_CODE (this is the first 16 positions of the PayPal transaction ID)
- auth_date = 06262009

Order Administration receives and processes the order. Based on the Reauthorization days defined for the PayPal pay type, the PayPal payment does not expire until 29 days from the current date.

You maintain the order and as a result the order total increases to \$680.00.

You generate a pick slip for the entire order. The authorization amount required to generate a pick slip for the order is \$680.00. While \$680.00 is within 15% of the unused PayPal authorization, it is greater than \$75.00 of the unused authorization. Because the authorization amount required to generate a pick slip for the order (\$680.00) is greater than \$75.00 of the unused PayPal authorization (\$600.00), the system:

- Does not generate a pick slip.
- Declines the PayPal authorization.
- Places the order on Credit Card Decline (AT) hold and the PayPal payment on the hold reason defined for the PPLDECLINE response code.
- Creates order history records, indicating the PayPal authorization was declined:

Date	Type	Transaction Note	Amount	User
6/26/09	AUTH	MANUAL AUTH# DETECTED - O-42693038SP2401	600.00	AUTH
6/26/09	PICK GEN	ORDER FLAGGED FOR CREDITCARD CANCELLATIO		USER
6/26/09	HOLD	SYS HLD - DECLINED CREDIT CARD	80.00	USER

Creates authorization history records for the PayPal payment on the order, indicating the authorization was declined.

Status	Auth #	Auth Date	Auth Expires	Amt Submitted	Amt Available
Authorized	O-AUTH_CODE	6/26/09	7/25/09	600.00	600.00
Declined		6/26/09	7/25/09	80.00	0.00

The system allows you to generate a pick slip for the order if:

- You maintain the order and decrease the amount so that it does not exceed \$75.00 of the unused PayPal authorization (\$675.00), or
- You maintain the order and apply the amount that exceeds \$75.00 of the unused PayPal authorization towards another form of payment.

Example: Initial PayPal Authorization Expired

A customer places an order on the web storefront and uses PayPal as the form of payment. The order total is \$100.00. Due to communication problems, the web storefront cannot send the PayPal payment to PayPal for approval. The web storefront sends the order to Order Administration without a manual authorization for the PayPal payment:

- cc_name = PAYPAL
- cc_number = O-AUTH_CODE (this is the PayPal transaction ID)

Order Administration receives and processes the order.

You generate a pick slip for the entire order. The authorization amount required to generate a pick slip for the order is \$100.00. Because a manual authorization does not exist for the PayPal payment on the order, the system:

- Does not generate a pick slip.
- Declines the PayPal authorization.
- Places the order on Credit Card Decline (AT) hold and the PayPal payment on the hold reason defined for the PPLDECLINE response code.
- Creates order history records, indicating the PayPal authorization was declined:

Date	Type	Transaction Note	Amount	User
6/26/09	PICK GEN	ORDER FLAGGED FOR CREDITCARD CANCELLATIO		USER
6/26/09	HOLD	SYS HLD - DECLINED CREDIT CARD	100.00	USER

Creates an authorization history record for the PayPal payment on the order, indicating the authorization was declined.

Status	Auth #	Auth Date	Auth Expires	Amt Submitted	Amt Available
Declined		6/26/09	7/25/09	100.00	0.00

Processing Deposits for a PayPal Order

When you process deposits for an order that contains a pay type with PPL (PayPal) defined as the deposit service, the system sends the deposit transaction directly to PayPal via PayPal SOAP API architecture.

- [PayPal Deposit Processing](#)
 - [Approved PayPal Deposits](#)
 - [Failed PayPal Deposits](#)
- [Purchase Deposit Transactions](#)
 - [PayPal DoCapture Request](#)
 - [PayPal DoCapture Response](#)
- [Return Deposit Transactions](#)
 - [PayPal RefundTransaction Request](#)
 - [PayPal RefundTransaction Response](#)

PayPal Deposit Processing

The system performs the following steps during PayPal deposit processing.

#	Step
1.	Determines if the deposit is for a debit or credit transaction. • If the deposit transaction is for a debit transaction, the system sends the PayPal DoCapture Request to PayPal. • If the deposit transaction is for a credit transaction, the system sends the PayPal RefundTransaction Request to PayPal.
2.	PayPal processes the deposit and sends the response back to Order Administration. • If the deposit transaction is for a debit transaction, PayPal sends the PayPal DoCapture Response to Order Administration. • If the deposit transaction is for a credit transaction, PayPal sends the PayPal RefundTransaction Response to Order Administration.
3.	Order Administration receives the response and processes the deposit. See Approved PayPal Deposits and Failed PayPal Deposits .

Approved PayPal Deposits

If the deposit for the PayPal payment was approved, the system:

- For debit transactions, updates the authorization history record with the deposit amount.
For example:

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Dep
Authorized	O-AUTH_CODE	7/28/09	8/26/09	100.00	.00	28.00

- Creates a deposit history record for the deposit transaction.

For debit transactions:

Inv#	Type	Date	Amt	Status	Response	Action
467	*PURCH	7/28/09	28.00	CONFIRMED	*PROCESSED	Deposit

For credit transactions:

Inv#	Type	Date	Amt	Status	Response	Action
479	*RETURN	7/30/09	20.00-	CONFIRME D	*PROCESSED	Return

- For debit transactions:
- Updates the Authentication value field in the Order Payment Method table with the transaction ID returned in the [PayPal DoCapture Response](#). However, if a transaction ID is already defined in the Authentication value field, the system replaces the transaction ID only if the deposit amount for the current deposit transaction is equal to or greater than the deposit amount for the previous deposit transaction. For example, If you process two deposit transactions for a PayPal order: the first deposit for \$25.00 and the second deposit for \$40.00, when you process the second deposit, the system updates the transaction ID defined in the Authentication value field with the transaction ID returned for the second deposit since the second deposit amount (\$40.00) is greater than the first deposit amount (\$25.00).
- During deposit processing, updates the Credit Card Deposit History table with the transaction ID for each successful deposit, storing it as the capture transaction ID. The system then uses this capture transaction ID to tie refunds, if generated, to individual deposits; see [Applying Refunds Across Multiple Capture Transaction IDs](#) for more information. This ID is not displayed on any screen.

Example: Approved PayPal Deposit Across Multiple Authorizations

The PayPal payment on an order has the following authorization history records:

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Deposit
Authorized	O-AUTH_CODE	7/28/09	8/26/09	100.00	.00	.00
Authorized	O-AUTH_CODE	7/28/09	8/26/09	12.00	.00	.00

You submit a debit deposit transaction for the PayPal payment for \$112.00. Order Administration sends the deposit transaction to PayPal in the [PayPal DoCapture Request](#) and receives the approved response in the [PayPal DoCapture Response](#).

Order Administration:

- Updates the authorization history records with the deposit amount of \$112.00.

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Deposit
Authorized	O-AUTH_CODE	7/28/09	8/26/09	100.00	.00	100.00
Authorized	O-AUTH_CODE	7/28/09	8/26/09	12.00	.00	12.00

- Creates a deposit history record for the deposit transaction.

Inv#	Type	Date	Amt	Status	Response	Action
469	*PURCH	7/28/09	112.00	CONFIRMED	*PROCESSED	Deposit

- Updates the Authentication value field in the Order Payment Method table with the transaction ID returned in the [PayPal DoCapture Response](#).

Example: Approved PayPal Deposit Across Multiple Deposits; Authentication Value Updated

The PayPal payment on an order has the following authorization history record:

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Deposit
Authorized	O-AUTH_CODE	7/28/09	8/26/09	100.00	.00	.00

You submit a debit deposit transaction for the PayPal payment for \$28.00. Order Administration sends the deposit transaction to PayPal in the [PayPal DoCapture Request](#) and receives the approved response in the [PayPal DoCapture Response](#).

Order Administration:

- Updates the authorization history record with the deposit amount of \$28.00.

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Deposit
Authorized	O-AUTH_CODE	7/28/09	8/26/09	100.00	.00	28.00

- Creates a deposit history record for the deposit transaction.

Inv#	Type	Date	Amt	Status	Response	Action
469	*PURCH	7/28/09	28.00	CONFIRMED	*PROCESSED	Deposit

- Updates the Authentication value field in the Order Payment Method table with the transaction ID returned in the [PayPal DoCapture Response](#).
- You submit a second debit deposit transaction for the PayPal payment for \$28.00. Order Administration sends the deposit transaction to PayPal in the [PayPal DoCapture Request](#) and receives the approved response in the [PayPal DoCapture Response](#).

Order Administration:

- Updates the authorization history record with the deposit amount of \$28.00.

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Deposit
Authorized	O-AUTH_CODE	7/28/09	8/26/09	100.00	.00	56.00

- Creates a deposit history record for the deposit transaction.

Inv#	Type	Date	Amt	Status	Response	Action
469	*PURCH	7/28/09	28.00	CONFIRMED	*PROCESSED	Deposit
470	*PURCH	7/28/09	28.00	CONFIRMED	*PROCESSED	Deposit

- Updates the Authentication value field in the Order Payment Method table with the transaction ID returned in the [PayPal DoCapture Response](#). The system performs this update because the deposit amount for the current deposit transaction (\$28.00) is equal to the deposit amount for the previous deposit transaction.
- You submit a third debit deposit transaction for the PayPal payment for \$44.00. Order Administration sends the deposit transaction to PayPal in the [PayPal DoCapture Request](#) and receives the approved response in the [PayPal DoCapture Response](#).

Order Administration:

- Updates the authorization history record with the deposit amount of \$44.00.

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Deposit
Authorized	O-AUTH_CODE	7/28/09	8/26/09	100.00	.00	44.00

- Creates a deposit history record for the deposit transaction.

Inv#	Type	Date	Amt	Status	Response	Action
469	*PURCH	7/28/09	28.00	CONFIRMED	*PROCESSED	Deposit
470	*PURCH	7/29/09	28.00	CONFIRMED	*PROCESSED	Deposit
471	*PURCH	7/30/09	44.00	CONFIRMED	*PROCESSED	Deposit

- Updates the Authentication value field in the Order Payment Method table with the transaction ID returned in the [PayPal DoCapture Response](#). The system performs this update because the deposit amount for the current deposit transaction (\$44.00) is greater than the deposit amount for the previous deposit transaction (\$28.00).

Example: Approved PayPal Deposit Across Multiple Deposits; Authentication Value Not Updated

The PayPal payment on an order has the following authorization history record:

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Deposit
Authorized	O-AUTH_CODE	7/28/09	8/26/09	100.00	.00	.00

You submit a debit deposit transaction for the PayPal payment for \$56.00. Order Administration sends the deposit transaction to PayPal in the [PayPal DoCapture Request](#) and receives the approved response in the [PayPal DoCapture Response](#).

Order Administration:

- Updates the authorization history record with the deposit amount of \$56.00.

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Deposit
Authorized	O-AUTH_CODE	7/28/09	8/26/09	100.00	.00	56.00

- Creates a deposit history record for the deposit transaction.

Inv#	Type	Date	Amt	Status	Response	Action
472	*PURCH	7/28/09	56.00	CONFIRMED	*PROCESSED	Deposit

- Updates the Authentication value field in the Order Payment Method table with the transaction ID returned in the [PayPal DoCapture Response](#).
- You submit a second debit deposit transaction for the PayPal payment for \$44.00. Order Administration sends the deposit transaction to PayPal in the [PayPal DoCapture Request](#) and receives the approved response in the [PayPal DoCapture Response](#).

Order Administration:

- Updates the authorization history record with the deposit amount of \$44.00.

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Deposit
Authorized	O-AUTH_CODE	7/28/09	8/26/09	100.00	.00	44.00

- Creates a deposit history record for the deposit transaction.

Inv#	Type	Date	Amt	Status	Response	Action
472	*PURCH	7/28/09	56.00	CONFIRMED	*PROCESSED	Deposit
473	*PURCH	7/28/09	44.00	CONFIRMED	*PROCESSED	Deposit

- Does not update the Authentication value field in the Order Payment Method table with the transaction ID returned in the [PayPal DoCapture Response](#). The system does not update this field because the deposit amount for the current deposit transaction (\$44.00) is less than the deposit amount for the previous deposit transaction (\$56.00).

Example: Approved PayPal Deposit and Catch-All Credit Card Deposit

The PayPal pay type on an order has the following authorization history record:

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Deposit
Authorized	O-AUTH_CODE	7/28/09	8/26/09	100.00	.00	.00

The catch-all credit card pay type on the order has the following authorization history record:

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Deposit
Authorized	AUTH_#	7/28/09	8/26/09	24.00	.00	.00

You submit a debit deposit transaction for the order for \$124.00. Order Administration:

- Sends the deposit transaction for the credit card to the account provider for deposit processing.
- Sends the deposit transaction to PayPal in the [PayPal DoCapture Request](#) and receives the approved response in the [PayPal DoCapture Response](#).

Order Administration:

- Updates the authorization history records with the deposit amount of \$124.00.

PayPal pay type:

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Deposit
Authorized	O-AUTH_CODE	7/28/09	8/26/09	100.00	.00	124.00

Catch-all Credit Card pay type:

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Deposit
Authorized	AUTH_#	7/28/09	8/26/09	24.00	.00	24.00

- Creates a deposit history record for the deposit transaction.

Inv#	Type	Date	Amt	Status	Response	Action	Ser
475	*PURCH	7/28/09	100.00	CONFIRMED	*PROCESSED	Deposit	PPL
475	*PURCH	7/28/09	24.00	CONFIRMED	100	Deposit	PMT

- Updates the Authentication value field in the Order Payment Method table with the transaction ID returned in the [PayPal DoCapture Response](#).

Example: Approved PayPal Credit Deposit

The PayPal payment on an order has the following authorization history records:

Status	Auth #	Auth Date	Auth Expires	Amt Submit	Amt Avail	Amt Deposit
Authorized	O-AUTH_CODE	7/30/09	8/28/09	100.00	.00	100.00
Authorized	O-AUTH_CODE	7/30/09	8/28/09	14.19	.00	14.19

A debit deposit history record exists for the order:

Inv#	Type	Date	Amt	Status	Response	Action
480	*PURCH	7/30/09	114.20	CONFIRMED	*PROCESSED	Deposit

The customer returns part of the order for a credit of \$22.00.

You submit a credit deposit transaction for the PayPal payment for \$22.00. Order Administration sends the deposit transaction to PayPal in the [PayPal RefundTransaction Request](#) and receives the approved response in the [PayPal RefundTransaction Response](#).

Order Administration creates a deposit history record for the credit deposit transaction.

Inv#	Type	Date	Amt	Status	Response	Action
481	*PURCH	7/30/09	22.00-	CONFIRMED	*PROCESSED	Return

Failed PayPal Deposits

The deposit transaction will be rejected if:

- Communication failures occur between Order Administration and PayPal.
- A duplicate deposit transaction already exists on the PayPal system.
- For debit deposit transactions:
 - The debit amount is greater than the associated authorization amount.
 - The transaction ID defined for the deposit does not match the associated authorization transaction.
- For credit deposit transactions:
 - The transaction ID defined for the deposit does not match the associated debit deposit transaction.
 - The credit amount is greater than the deposit amount.

For example, the PayPal payment on an order receives an authorization for \$100.00.

On 6/24, the system ships part of the order for \$40.00.

On 6/30, the system ships the rest of the order for \$60.00.

On 7/15, the system processes a return for the order for \$75.00.

Because the return amount of \$75.00 is greater than each deposit amount, PayPal fails the return deposit.

Correcting failed deposits: You can use the Submit Rejected Deposits (SRDP) menu option to cancel or resend failed deposits.

See [PayPal Direct Connection Integration Troubleshooting](#).

Purchase Deposit Transactions

Deposits for a debit (*PURCH) transaction use the PayPal DoCapture method to process the settlement. The system uses the API credentials ([API User name](#), [API Password](#), and [API Signature](#)) defined for the PPL account provider as the credentials used to establish a direct connection to the PayPal system during deposit processing.

PayPal DoCapture Request

Order Administration sends the purchase deposit transaction to PayPal in the PayPal DoCapture Request transaction.

Parameter	Description
METHOD	DoCapture. Transactions sent to PayPal for a purchase deposit use the PayPal DoCapture API.
AUTHORIZATION ID	The transaction ID from the Credit card # field in the Order Payment Method table.
AMT	The amount of the deposit transaction. PayPal will accept an amount that is up to 15% or \$75.00 more than the original authorization amount. Note: This amount cannot exceed \$10,000.
CURRENCYCODE	The PayPal currency code, from the ASC Currency code field in the Auth Service Currency table that corresponds to the Currency in the Order Header Extended table. - If the Currency in the Order Header Extended table is blank, the system uses the currency code defined in the Local Currency Code (A55) system control value to determine which ASC Currency code in the Auth Service Currency table to use. - If a cross reference is not defined in Authorization Service Currency for the selected currency code, the system leaves the CURRENCYCODE in the PayPal DoCapture Request blank; PayPal treats a blank CURRENCYCODE as USD currency. See the Work with Authorization Service Currency Screen to cross-reference the Order Administration currency code to the PayPal currency code.
COMPLETETYPE	NotComplete. This value indicates that there may be additional captures.
INVNUM	The company number and invoice number. Also includes the ecommerce order number if the Append Ecommerce Order # to PayPal Invoice ID (M40) system control value is selected. The company number and invoice number include leading zeros. Example: 006-0000467-EC12345, where 006 is the company number, 0000467 is the invoice number, and EC12345 is the ecommerce order number.
NOTE	The charge description from the Charge description field in the Authorization Service table, followed by the order number. A plus sign (+) displays for each space. Example: PAYPAL+DIRECT+COMMUNICATION+1845, where PAYPAL DIRECT COMMUNICATION is the charge description and 1845 is the order number.

PayPal DoCapture Response

Order Administration receives the purchase deposit response transaction from PayPal in the PayPal DoCapture Response transaction.

Parameter	Description
AUTHORIZATION ID	The transaction ID from the card number field in the Order Payment Method table.
TRANSACTIONID	The unique transaction ID assigned by PayPal to the deposit confirmation. Updates the Authentication value field in the Order Payment Method table. However, if a transaction ID is already defined in the Authentication value field, the system replaces the transaction ID only if the deposit amount for the current deposit transaction is equal to or greater than the deposit amount for the previous deposit transaction. Example: If you process two deposit transactions for a PayPal order: the first deposit for \$25.00 and the second deposit for \$40.00, when you process the second deposit, the system updates the transaction ID defined in the Authentication value field with the transaction ID returned for the second deposit since the second deposit amount (\$40.00) is greater than the first deposit amount (\$25.00). Capture transaction ID: During deposit processing, the system updates the Credit Card Deposit History table with this transaction ID for each successful deposit, storing it as the capture transaction ID. The system then uses this capture transaction ID to tie refunds, if generated, to individual deposits; see Applying Refunds Across Multiple Capture Transaction IDs for more information. This ID is not displayed on any screen.
PARENT TRANSACTIONID	
PAYMENTTYPE	Indicates whether the payment is instant or delayed.
ORDERTIME	The date and time when the payment was processed by PayPal. Example: 2009-07-24T17:23:15Z
AMT	The final amount charged, including any shipping and taxes from the Merchant Profile.
FEEAMT	The PayPal fee amount charged for the transaction.
SETTLEAMT	The amount deposited in the merchant's PayPal account if there is a currency conversion.
EXCHANGERATE	The exchange rate if a currency conversion occurred.
PAYMENTSTATUS	Order Administration considers a deposit successful if the following status is received: - Completed = The payment was completed, and the funds were added successfully to the merchant's account balance. - Refunded = The merchant refunded the payment. - Processed = A payment was accepted. The system considers any other response a rejected deposit. Updates the Response field in the Deposit History table.

Return Deposit Transactions

Deposits for a credit (*RETURN) transaction use the PayPal RefundTransaction method to process the settlement. The system uses the API credentials ([API User name](#), [API Password](#), and [API Signature](#)) defined for the PPL account provider as the credentials used to establish a direct connection to the PayPal system during deposit processing.

PayPal RefundTransaction Request

Order Administration sends the return deposit request transaction to PayPal in the PayPal RefundTransaction Request transaction.

Parameter	Description
METHOD	RefundTransaction. Transactions sent to PayPal for a return deposit use the PayPal RefundTransaction API.
TRANSACTIONID	The transaction ID from the Authentication value field in the Order Payment Method table for the record associated with the first non-deactivated PayPal pay type. This ID is also stored in the Credit Card Deposit History table as the capture transaction ID. The system uses this value to match a purchase deposit to the return deposit. When a refund is applied across multiple transactions, the system uses the capture transaction IDs to reconcile the refund amounts and submits each refund amount separately based on the originating capture transaction ID. See Applying Refunds Across Multiple Capture Transaction IDs for a discussion. If a transaction ID does not exist in the Authentication value, the system sends a blank Authorization ID field to PayPal. Because PayPal cannot match a purchase deposit to the return deposit, the system places the return deposit in a failed status.
REFUNDTYPE	The type of refund to make. Set to Partial.
AMT	The amount of the deposit (refund) transaction. Return Amount PayPal does not accept returns for an amount that is greater than the original deposit amount. For example, the PayPal payment on an order receives an authorization for \$100.00. - On 6/24, the system ships part of the order for \$40.00. - On 6/30, the system ships the rest of the order for \$60.00. - On 7/15, the system processes a return for the order for \$75.00. Because the return amount of \$75.00 is greater than each deposit amount, PayPal fails the return deposit.
NOTE	The charge description from the Charge description field in the Authorization Service table, followed by the order number. A plus sign (+) displays for each space. Example: PAYPAL+DIRECT+COMMUNICATION+1845, where PAYPAL DIRECT COMMUNICATION is the charge description and 1845 is the order number.

PayPal RefundTransaction Response

Order Administration receives the return deposit response transaction from PayPal in the PayPal RefundTransaction Response transaction.

Parameter	Description
REFUND TRANSACTIONID	The unique transaction ID assigned by PayPal to the deposit confirmation.
NETREFUNDAMT	The amount subtracted from the PayPal balance of the original recipient of payment to make this refund.
FEEREFUNDAMT	The transaction fee refunded to the original recipient of payment.
GROSSREFUND AMT	The amount of money refunded to the original payer.

PayPal Authorization Reversals

Authorization reversals use the PayPal DoVoid method to request the reversal. The system uses the API credentials ([API User name](#), [API Password](#), and [API Signature](#)) defined for the PPL account provider as the credentials used to establish a direct connection to the PayPal system when processing a stored value card authorization trigger record (File/Key = AHR).

Sent when? The system creates authorization reversal triggers only if the [Send reversal](#) flag is selected for PayPal in [Defining Authorization Services \(WASV\)](#). Also, the system sends a DoVoid request for a reversal only if:

- The entire order is canceled or sold out, or;
- The payment method is deactivated before any transactions are billed.

The system does not submit a reversal to PayPal for a partial amount, such as when:

- A single item on a multi-line order is canceled or sold out.
- A single unit on an order line is canceled or sold out.
- Any items remaining on the order are canceled after a shipment has taken place.

For more information: See:

- [Stored Value Card Authorization Reversal](#) for background.
- [Working with Outbound Interface Transactions \(WOIT\)](#) for information on creating and processing outbound interface triggers.
- [Defining Authorization Services \(WASV\)](#) for information on setting up PayPal as an authorization service.

PayPal DoVoid Transaction Request

Order Administration sends the DoVoid request to PayPal to request an authorization reversal.

The DoVoid request specifies the stored value card number for the Order Payment Method as the AUTHORIZATIONID.

PayPal DoVoid Transaction Response

The DoVoid response confirms that the DoVoid request was successful and echoes the AUTHORIZATIONID.

PayPal Direct Connection Integration Restrictions

The Order Administration PayPal Direct Connection does not support the following.

- Online or batch authorization processing in Order Administration. Web orders containing a PayPal payment must receive an approved authorization from PayPal on the web storefront before being sent to Order Administration for processing.
- Additions to orders that contain a PayPal pay type in Order Maintenance that would exceed 15% or \$75.00 of the initial authorization received for the PayPal payment. For example, if the authorization received for the PayPal payment is \$100.00, you can apply up to \$115.00 towards the PayPal authorization ($\$100.00 + 15\% = \$115.00$).
- Orders that contain multiple ship to customers.
- Gift card payments.
- Alias items.
- Promotions applied to web orders in Order Administration. Final order amounts must be passed from the web storefront.
- Authorization reversals are supported only for the full amount of the authorization when the entire order is canceled or sold out, when the payment method is deactivated.
- Exchanges and returns performed through order entry are not recommended when the pay type on the order is PayPal; however, the system does not prevent either activity.
- Exchanges are not supported if there is a charge on the exchanged item. In this scenario, you must create a separate order for the new charge with a different customer payment.
- Returns/Refunds using the PayPal payment cannot be greater than the original deposit amount.

PayPal Direct Connection Integration Troubleshooting

If you have problems connecting to PayPal during deposit processing, use the following steps to help troubleshoot the issue.

PayPal service set up correctly? Verify that you have performed the required setup for the PayPal Direct Connection integration; see [PayPal Direct Connection Integration Setup](#).

PayPal Log

When you process deposits for an order containing a PayPal pay type, the system sends the deposit transaction directly to PayPal and logs the transactional information in the PayPal log.

Information in log: The PayPal log includes a copy of the deposit information sent between Order Administration and PayPal. In addition, any errors that may occur during deposit transaction processing are captured in the log.

You can use this log to confirm that communication between Order Administration and PayPal is working correctly, to isolate communication problems, or to recover information.

Sample log information:

Successful deposit process generates IFO level messages, such as the following:

```
11:56:55,831 INFO PAYPAL - [Settlement] Transmitted deposit(*PURCH)
Processed :
AMT=20.94&INVNUM=I23-1754&NOTE=PAYPAL+1754&AUTHORIZATIONID=AUTH_ID&COM
PLETETYPE=NotComplete&METHOD=DoCapture
```

Failure deposit process and errors during processing generates ERROR level messages, such as the following:

```
11:56:55,831 ERROR PAYPAL - [Settlement] Transmitted deposit(*PURCH)
Failure : AMT=20.94=123-1234=PAYPAL+1754=AUTH_ID=NotComplete=DoCapture
11:57:06,581 ERROR PAYPAL - [Settlement] Timestamp      : 2009-05-08T15:52:55Z
11:57:08,737 ERROR PAYPAL - [Settlement] CorrelationId   : CORR_ID
11:57:10,284 ERROR PAYPAL - [Settlement] Error code      : 10002
11:57:11,972 ERROR PAYPAL - [Settlement] Short message   : Security error
11:57:15,018 ERROR PAYPAL - [Settlement] Long message    : Security header is
not valid
11:57:17,300 ERROR PAYPAL - [Settlement] Severity code   : Error
11:57:20,297 INFO  PAYPAL - [Settlement] Transmitted
deposit(*RETURN)Failure :
AMT=68.00=123-123456=PAYPALID+7042982=AUTH_ID=NotComplete=RefundTransaction
```

The time elapsed to receive a response is indicated in a DEBUG level message, such as the following:

```
12:19:13,481 DEBUG PAYPAL - message: [Settlement] Got response,
elapsed time = 2 seconds
```

Errors reading the authorization service or authorization service extended generates ERROR level messages, such as the following:

```
11:31:04,471 ERROR PAYPAL - [Settlement] Defaults set. Do not process
in PayPal 'live' environment
11:31:31,841 ERROR PAYPAL - [Settlement] Exception(s) encountered
during Initialization. No Deposit processing performed.
```

PayPal Direct Connection Integration Setup

Purpose: Before you can use the PayPal - Direct Connection integration, you must perform the necessary setup.

- [Creating the PayPal Decline Order Hold Reason](#)
- [Creating the PPL \(PayPal\) Account Provider](#)
- [Creating a PayPal Pay Type](#)

If you are upgrading from 5.0: In 5.0, the PayPal credentials are stored in the System Properties (PPOP) menu option. When you upgrade from version 5.0, the PayPal credentials are stored in the Work with Authentication Services (WASV) menu option in the API user name, API password, and API signature fields. You will need to redefine your PayPal credentials as part of the upgrade process.

Type of PayPal integration: The PayPal Direct Connection integration uses PayPal's Express Checkout to send deposit transactions between PayPal and Order Administration. Communication protocol is provided through the PayPal SOAP API Architecture, which uses a signed SOAP request over HTTPS. The PayPal API jar file, provided by PayPal and included with Order Administration, handles communication between PayPal and Order Administration.

In order to use the PayPal Direct Connection integration, your web storefront must support a direct connection to PayPal to perform authorizations.

Related system control value: In addition to the setup described below, you can use the Append Ecommerce Order # to PayPal Invoice ID (M40) to define whether to include the ecommerce order number in the INVNUM set to PayPal.

Creating the PayPal Decline Order Hold Reason

Use the [Establishing Order Hold Reason Codes \(WOHR\)](#) menu option to create the PP (PayPal Decline) order hold reason code. The system assigns this reason to the PayPal pay type on the order when it is declined during PayPal authorization processing at pick slip generation time.

At the [Create Order Hold Reason Screen](#), enter the following information:

Field	Description
Reason	Enter PP.
Description	Enter PAYPAL DECLINE.

Creating the PPL (PayPal) Account Provider

Use the [Defining Authorization Services \(WASV\)](#) menu option to create the PPL account provider.

Multiple PayPal accounts: If you use multiple PayPal accounts, for example, each of your entities uses an individual PayPal account, you can:

- Use the [Work with Merchant ID Overrides Screen](#) to set up overrides for the different entities in your company. In this situation, you can define unique API credentials to establish a connection to the PayPal system for each of your PayPal accounts at the [Create Merchant ID by Entity Screen](#). You can create one PayPal pay type for all of your accounts; see [Creating a PayPal Pay Type](#).
- Use the [Work with Authorization Service Currency Screen](#) to set up a cross-reference between the Order Administration currency code and the PayPal currency code. When sending the [PayPal DoCapture Request](#) to PayPal, the system populates the [CURRENCYCODE](#) in the request with the ASC Currency code in the Auth Service Currency table that corresponds to the Currency in the Order Header Extended table.
 - If the Currency in the Order Header Extended table is blank, the system uses the currency code defined in the Local Currency Code (A55) system control value to determine which ASC Currency code in the Auth Service Currency table to use.
 - If a cross reference is not defined in Authorization Service Currency for the selected currency code, the system leaves the CURRENCYCODE in the PayPal DoCapture Request blank; PayPal treats a blank CURRENCYCODE as USD currency.

At the [First Create Authorization Services Screen](#), enter the following information:

Field	Description
Service code	Enter the name of the PayPal account; for example PPL.
Application	Select Auth/Deposit.
Charge description	Enter PAYPAL DIRECT CONNECTION.

At the [Second Create Authorization Service Screen](#), enter the following information:

Field	Description
Media type	Select Communication.
Batch/Online	Select Batch.
Active production system?	Select this field to send transactions to PayPal.

Field	Description
Primary authorization service	Enter PPL.
Test mode?	Select this field if you are sending transactions to PayPal's test "sandbox" environment. Deselect this field if you are sending transactions to PayPal's production "live" environment. The following fields are used to establish a connection to the PayPal system when using the PayPal Direct Connection Integration . You can also define API credential information at the entity level using the Create Merchant ID by Entity Screen .
API User name	Enter the user name, provided by PayPal, used to establish a direct connection to the PayPal system during deposit processing.
API Password	Enter the password, provided by PayPal, used to establish a direct connection to the PayPal system during deposit processing.
API Signature	Enter the encrypted signature, provided by PayPal, used to establish a direct connection to the PayPal system during deposit processing.

At the [Create Vendor Response Screen](#), enter the following information:

Field	Description
Response code	Enter PPLDECLINE.
Description 1	Enter PAYPAL DECLINE.
Hold reason	Enter PP. If you do not enter PP as the hold reason, the system places the PayPal payment on AV hold.

Creating a PayPal Pay Type

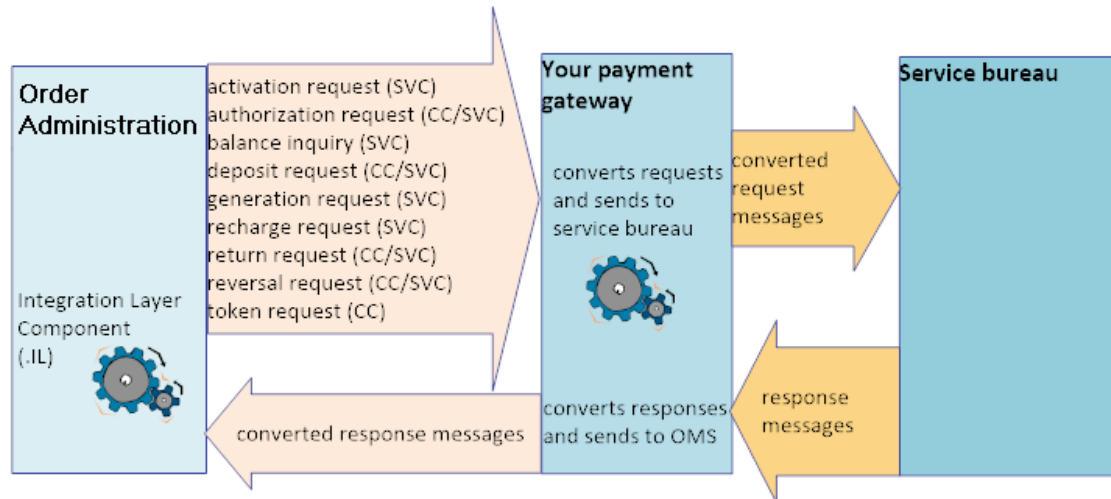
Use the Work with Pay Types (WPAY) menu option to create the PayPal pay type, making sure to define the following information.

Field	Description
Pay category	Enter Credit Card (pay category 2).
Card type	Enter Credit (card type C).
Authorization service	Enter the name of the PayPal Direct Connection account provider, for example, PPL.
Deposit service	Enter the name of the PayPal Direct Connection account provider, for example, PPL.
Reauthorization days	Enter the number of days before PayPal payments expire. Make sure the number of days you enter matches the number of days defined in the PayPal system. Typically, PayPal payments are good for 29 days.
Send reversal	Select this field to enable sending reversals to PayPal when the value of the entire authorization amount is canceled or deactivated. See Stored Value Card Authorization Reversal for background.

External Payment Service

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

This payment service needs to be configured to use the integration layer component of Order Administration, as this component controls payment service processing.



Supported stored value card transactions:

- activation request
- authorization request
- balance inquiry
- deposit request
- generation request
- recharge request
- return request
- reversal request

For more information: For background on stored value card authorization, see:

- [Defining Authorization Services \(WASV\)](#)

In this topic:

- [External Payment Service Setup](#)
 - [Authorization Service Settings](#)
 - [Work with Pay Types \(WPAY\)](#)
 - [Work with Order Types \(WOTY\)](#)
 - [Stored Value Card Reversal Function](#)
- [Subsequent Authorization Requests through the External Payment Service](#)

For sample messages see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

External Payment Service Setup

The required setup for the External Payment Service is described below, and includes:

- [Secured Feature](#)
- [Authentication](#)
- [Authorization Service Settings](#)
- [Work with Pay Types \(WPAY\)](#)
- [Work with Order Types \(WOTY\)](#)

Additional security requirements: For additional security-related setup requirements, including implementation of OAuth, see the External Payment Service Technical Reference Paper on My Oracle Support (2149144.1).

Secured Feature

The [External Authorization Service Access \(B25\)](#) secured feature controls access to the [Work with External Authorization Service Screen](#), where you can work with required settings for the External Payment Service. These settings are described briefly below under [External Service Settings](#)

Authentication

Use OAuth to authenticate the External Payment Service. See the Oracle Retail Omnichannel Web Service Authentication Guide on My Oracle Support (2728265.1) for more information.

Authorization Service Settings

Use [Defining Authorization Services \(WASV\)](#) to create a account provider for the External Payment Service.

Settings for External Payment Service: The following table lists some of the required settings, in addition to the basic settings required for all account providers and any optional settings, to support the External Payment Service.

Fields at the first Create/Change/Display Authorization Services screen include:	Description
Service Code	Typically set to EXT or EXC, but can be set to anything.
Application	Select Auth/Deposit.
Void auth at deposit	Select this field to void any unused portion of a credit card or stored value card authorization at deposit time. Note: The Retain Unused Stored Value Card Authorization After Deposit (J21) system control value does not control stored value card deposit updates for the External Payment Layer.
Send reversal	Select this field to perform a credit card authorization reversal when you process a cancellation associated with a credit card payment or deactivate a credit card payment.

Fields at the first Create/Change/Display Authorization Services screen include:	Description
Fields at the second Create/Change/Display Authorization Services screen:	
Media type	Select Communication.
Batch/Online	Select Online or Batch.
Immediate response	Must be selected.
Primary authorization service	Should be blank
Communication type	Payment Link must be selected, to indicate messages sent the external payment layer are processed directly.
Response check frequency	Indicates the multiple to apply to the Response time to determine how long to wait for a response after a connection when you are using the External Payment Service. For example, if the Response check frequency is 6 and the Response time is 10,000, the system waits 60,000 milliseconds (60 seconds or 1 minute) for a response after connection. Note: If the total response interval is exceeded for an authorization record, the record goes into *RCVD status with a response type of SU, and is then removed from the Credit Card Authorization Transaction table (CCAT00).
Response time	Indicates the number of milliseconds to wait for a connection to the account provider when you are using the External Payment Service. For example, set this field to 10,000 milliseconds to wait 10 seconds for a connection. Note: Order Management System does not wait the entire response time if it is not necessary. To avoid potential timeout issues, Oracle recommends that you set the Response Time high enough for the authorization service to prevent issues that could potentially occur if the authorization process times out while processing multiple authorizations for an order.
Country codes	If needed, define a cross reference between your country code and the country code used by the account provider. Note: This option also indicates whether a account provider performs address verification processing for the country. See Defining Authorization Service Countries .
Currency codes	If needed, define a cross reference between your currency code and the currency code used by the account provider; see Defining Authorization Service Currencies .
Merchant ID Override	If needed, define a merchant ID override for the different entities in your company; see Defining Merchant ID Overrides .
Paytype codes	If needed, define a cross reference between your pay type code and the pay type code used by the account provider; see Defining Vendor Paytype Codes .

Fields at the first Create/Change/Display Authorization Services screen include:	Description
Response codes	Define the reasons that the account provider approves (authorizes) or declines a transaction. The codes are assigned to each transaction by the account provider when approving or declining the request; see Defining Vendor Response Codes. A response code of SU, indicating service unavailable, must be created. When there is a REJECT or ERROR response, the order goes on AT hold and the authorization is updated as declined when: • The reason code passed is not defined as an authorization response code, or • The reason code passed is defined as an authorization response code but also has a hold code defined, or • No reason code is passed. If no reason code is passed, a response code of SU is applied.

External Service Settings

The additional External Service Settings at the [Work with External Authorization Service Screen](#) are accessible only to users with [External Authorization Service Access \(B25\)](#) authority.

All fields on the screen are required, with the exception of the External Service flag.

Tracking changes to external service settings: Changes that users make to external service settings are tracked in the User Audit table, and listed on the User Authority Change report. See [Tracking User, Authority, and Password Updates](#) for more information.

For more information: See the External Payment Layer RESTful Service technical reference on My Oracle Support for more information on updating these settings.

Setting	Notes
External Service	Select this field to have request messages generated for the External Payment Service.

Setting	Notes
External URL Prefix	The prefix that forms the beginning of the URL where messages are sent. Must begin with https. The message type defines the endpoint suffix that is appended to the prefix, creating the entire URL. For example, for a credit card authorization request, the entire URL might be https://remote.auth.com:1234/authorization, where remote.auth.com is the remote server, 1234 is the port, and authorization identifies an authorization request. The following endpoints are supported: • balanceInquiry • authorization • reversal • getAuthToken • generateGift • activateGift • rechargeGift • deposit • return
Message Version	Indicates which message version is supported with version 3.0 being the default version when creating a new authorization service. Previous versions have been removed. Version 3.0 no longer includes tags that pass the credit card number for an order and instead includes tags that pass the card token. It also allows an external merchant application to call for both Credit Cards and Stored Value Cards supported through the External Payment Service and EFTConnect.
Authentication User	The user ID for authentication of the messages to the external service.
Authentication Password	The password for authentication of the messages to the external service. Must be at least 6 positions long, include both numbers and letters, include a special character, and cannot end with a number.

Work with Pay Types (WPAY)

Use [Working with Pay Types \(WPAY\)](#) to assign the authorization and deposit service to each credit card or stored value card pay type that uses the External Payment Service.

Work with Order Types (WOTY)

In order to perform online authorization on web orders, the Online Authorization setting for the order type on the web order must be set to Without Window. See [Establishing Order Types \(WOTY\)](#) for more information on setting up an order type.

Stored Value Card Reversal Function

You can use a periodic function, described below, to submit stored value card reversal requests for closed or canceled orders.

REVXAHP (Program name = PFREVXAHP): Reverse Partial Auth for External Payment

Service: Generates SVC reversal request messages for the External Payment Service within the specified company, provided that:

- A company is specified.
- The parameter specified for the function is a valid stored value card pay type code for the company.
- The pay type is assigned to an authorization service configured as the External Payment Service.
- The pay type does not match the [Default Auth Code for CC Netting \(M25\)](#) system control value.

For more information: See [Stored Value Card Authorization Reversal](#) for an overview of the authorization reversal process.

Subsequent Authorization Requests through the External Payment Service

About subsequent authorizations: Order Administration sends information through the External Payment Service and EFTConnect indicating whether a transaction was initiated by the merchant, or by the customer. For example, when the customer initially places the order, this is a transaction initiated by the customer; an example of a merchant-initiated transaction is a subsequent authorization that is acquired by Order Administration when the initial authorization is expired.

Term definitions:

- Merchant-Initiated Transactions (MIT): An authorization that the system initiates without the customer's active participation.
- Cardholder-Initiated Transactions (CIT): An authorization that uses payment information provided by the customer.
- Credentials on File (COF): The cardholder payment information that is stored by the system.

Types of subsequent authorizations: Brief descriptions of subsequent authorization types for credit cards include:

- Resubmission of a failed deposit: When the [Supports Auth Resubmission](#) flag is selected for the authorization service and a previous deposit request for the credit card failed. A subsequent authorization and deposit request is generated, with the subsequentAuth tag set to Y and the subsequentAuthReason set to RESUBMIT. However, if the [Supports Auth Resubmission](#) flag is not selected, the subsequentAuthReason is set to REAUTH.
- Split shipment: When the order is not fulfilled in a single shipment. In this case, the request for the subsequent authorization includes a subsequentAuthReason set to REAUTH and passes the existing ci_transaction_id as the subsequentAuthTransactionID.
- Deferred or installment billing: When the order uses deferred or installment billing. The pay type's Notify of installments setting indicates whether to send the subsequentAuthReason set to INSTALLMENT or REAUTH. See [Deferred/Installment Billing Overview](#) for background.

- Customer membership orders: When you generate orders for a customer membership that has been authorized. Authorization can take place either through the order originating the customer membership, or through a generated membership order. The CIT Transaction ID (customer-initiated transaction ID) and the original authorization amount are stored on the customer membership, although this information is not displayed on any screen. For more information, see [Subsequent Authorizations through the External Payment Service for Membership Orders](#).

For EFTConnect, see the Payment Configuration, Merchant Account option in Modern View for setting these flags. For External Payment Service, see the [Defining Authorization Services \(WASV\)](#) option for setting these flags.

Details on the External Payment Service tags supporting subsequent authorization requests: See the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

External Payment Service Level 2 and 3 Discounting

External Payment Service supports the ability for a Retailer to leverage attributes within the request and response messages to qualify for Level 2 and Level 3 discounts. Certain Business-to-Business (B2B) and Business-to-Government (B2G) credit card types and their transactions can qualify for Level 2 or Level 3 discounts on processing fees, and when applied, can save the retailer a significant amount of money on the fees.

In order to qualify for Level 2 or Level 3 discounts, additional data must be sent on the authorization transactions to the Payment Service Provider.

For example, to qualify for Level 2 discounts, the following additional fields can be sent:

- Customer Reference, Sales Tax Amount, Requestor Name, Ship To Name, Ship To Address, Customer Tax Id

For Level 3 discounts, send the Level 2 fields and the following additional Order and Item fields:

- Order Number, Order Date, Invoice Number, Duty Amount, Freight Amount, Ship To Country, Discount Amount, Freight Tax Amount
- Item Id, Item Description, Item Quantity, Item Unit Of Measure, Item Price, Item Line Total, Item Commodity Code, Item Line Discount, Item Tax Amount, Item Class, Item Tax Rate

Additionally, some Payment Service Providers can return a Card Level Indicator on payment transaction responses. This indicator could be used by the Retailer when sending payment transactions to the payment provider, in order to determine whether to forward the Level 2/3 data fields, where the payment provider wants to be selective in what data is transmitted to the different issuers.

- Optionally, pass the Card Level Indicator with a Card Payment when available through External Payment Service or CWOOrderIn.
- Blank or not set - It is not eligible for Level 2/3 discounts, or is unknown
- "2" - It is eligible for Level 2 discounts (generally commercial, corporate and government cards)
- "3" - It is eligible for Level 3 discounts (generally commercial, corporate and government cards)
- The Card Level Indicator will be updated if the card is replaced through Manage Rejected Deposits and Customer Membership based on the new card entered.
- The Card Level Indicator will be stored with Customer Memberships and included in the order payment method of generated child membership orders.

Purging Tables

Topics in this part:

- [Purging Prestige Credit Card Deposits \(MPSP\)](#) describes how to purge processed records from the Credit Card Deposit Prestige table.
- [Purging Orders \(MPOR\)](#) described how to purge closed and canceled orders based on the date of last activity.
- [Purging Sold To Customers](#) describes how to purge eligible sold to customers based on the customer's last change date.
- [Purging Suspended Orders \(PSOR\)](#) describes how to remove orders in a suspended status from the system.
- [Purging SKUs \(MPSK\)](#) described how to remove item/SKUs based on item status from the system.
- [Additional Purges](#) summarizes the additional purges available.

Purging Sold To Customers

Purpose: Use the PURGECS Purge Sold To Customers periodic function (program name PFR0137) to purge eligible sold to customers.

Which customers are purged? For the customer to be eligible for purge, the system verifies that:

- the last change date for the customer is older than the number of days defined in the periodic function's Parameter field. If the Parameter is blank or 0, records must be 365 days old to be eligible for purge.
- there are no unpurged orders for the customer.
- the customer does not exist in the Customer Fraud table.
- there are no open refunds for the customer.
- there are no open returns for the customer.
- there are no open ticklers for the customer.
- there are no catalog requests for the customer.
- there are no active or in-process memberships for the customer.
- there are no open purchase orders for the customer.

Once the purge completes, the system generates the [Purged Customer List](#), listing the sold to customers that were removed.

The system writes processing details to the Trace log.

Purging an individual customer:

- To purge an individual sold to customer, use the Delete option in [Creating and Updating Sold-to Customers \(WCST\)](#).
- To purge an individual ship to customer, use the Delete option in [Creating and Updating Sold-to Customers \(WCST\)](#).
- To purge an individual bill to customer, use the Delete option in [Creating and Updating Bill-to Customers \(WCBT\)](#).

Updated tables: See the [Tables Updated during Customer Purge](#) for a listing of the tables purged through the PURGECS Purge Customers periodic function (program name PFR0137).

Before you purge customers:

- Use the [Purge Catalog Request History \(PCRH\)](#) menu option to delete outdated records from the Catalog Request History table.
- Use the [PURGEOR](#) Purge Orders periodic function (program name PFR0114) to purge orders that are closed or canceled. See [Purging Orders \(MPOR\)](#) for processing details.

In this topic:

- [Tables Updated during Customer Purge](#)

For more information: See:

- [How to Schedule a Job](#) for information on scheduling a periodic process that includes the PURGECS periodic function
- [Working with Periodic Functions \(WPER\)](#) for information on setting up periodic functi

Tables Updated during Customer Purge

Purpose: The system purges records in the following customer-related and order-related tables when you use the PURGECS Purge Customers (program name PFR0137) periodic function.

- Contract Price (PRCNPR)
- Correspondence History (MSCOHS)
- Cust Mail/Rent Changes (OECMRC)
- Cust Sold To Item Class Entity (OEICEP)
- Customer Action (CSCSAC)
- Customer Action Note (OECACN)
- Customer Address Change (CSCACP)
- Customer Affinity (CSAFFY)
- Customer Individual (CSCIFP)
- Customer Individual Mail History (CSTIMH)
- Customer Individual Order History (CSTIOH)
- Customer Membership (OECSMP)
- Customer Membership Detail (OECSMD)
- Customer Note (CSCUNO)
- Customer Ownership (OECSOW)
- Customer Pay Type Exclusion (CSCPTX)
- Customer Profile (CSCPRO)
- Customer Ship To (CSSHIP)
- Customer Ship To Entity (OECHPEP)
- Customer Ship To Extended (CSHXNA)
- Customer Ship To Mail History (CSHPMH)
- Customer Ship To Order History (CSHORH)

- Customer Ship To Phone # (CSCTP#)
- Customer Shipment History (FLCSHP)
- Customer Sold To (OECSSL)
- Customer Sold To BML (OECSBM)
- Customer Sold To Email (OECSEM)
- Customer Sold To Entity (OECSEP)
- Customer Sold To Extended (CSTXNA)
- Customer Sold To Item Class (OECSIC)
- Customer Individual (CSCIFP)
- Customer Sold To Item Class Entity (OEICEP)
- Customer Sold To Mail History (CUSTMH)
- Customer Sold To Order History (CSTOOH)
- Customer Sold To User Field (OECSUF)
- Customer Profile (CSCPRO)
- Customer Sold To Promotion (OECSPR)
- Customer Sold To Phone # (CSCSP#)
- Customer Sold To Xref (OECSXR)
- Customer Source Finder (CSSFND)
- Customer Subscription (OECSSB)
- Customer Tax (OECSTX)
- Customer Warehouse (CDCWFP)
- Customer Warranty Track (CSWTRP)
- DW Correspondence History (DWCSEM)
- EC CST Ext (EXCSTE)
- Marketing Download Customer Address Change (IXDTCA)
- Marketing Download Customer Inquiry (IXDTCI)
- Marketing Download Customer Ownership (IXDTCO)
- Marketing Download Customer Profile (IXDTCP)
- Marketing Download Customer Status Change (IXDTCS)
- Tickler (MSTKLR)

Additional Purges

Purpose: In addition to the purges described earlier under [Purging Tables](#), you can use the purge options listed below to delete outdated or unneeded records in various tables. Purging unnecessary records can help save space and improve performance.

- For more information: See:
- Active Procedures: [Purging Active Procedures \(MACP\)](#).
- Correspondence History: [Purging Email History \(MPCH\)](#).

- Customer Subscriptions: [Purging Subscriptions \(MPCS\)](#).
- **Orders:** [Purging Orders \(MPOR\)](#) **Note: You can also purge a single order through the Purge Orders by Order Number menu option, fast path = MORP.**
- Prestige Credit Card Deposits: [Purging Prestige Credit Card Deposits \(MPSP\)](#).
- Refund Checks: [Reconciling Checks \(MREC\)](#).
- SKUs: [Purging SKUs \(MPSK\)](#).
- Suspended Orders: [Purging Suspended Orders \(PSOR\)](#).
- [Purge Inventory Transaction History \(MITH\)](#)
- [Purge Purchase Order \(MPOP\)](#)
- [Purge Empty Item Locations \(PITL\)](#)
- [Purge Order Billing History \(POBH\)](#)
- [Purge Orders by Order Number \(MORP\)](#)

Flexible Payment Options

Topics in this part:

- [Deferred/Installment Billing Overview](#) provides an overview of how flexible payment options work.
- [Deferred/Installment Billing Setup](#) describes the steps necessary to set up deferred or installment billing pay plans.
- [Working with Flexible Payment Options \(WFPO\)](#) describes the screens you use in the Work with Flexible Payment Options menu option.
- [Credit Card Net Exchange Billing](#) describes the process the system uses to net credit invoices with debit invoices before a deposit is sent to the service bureau for an invoice associated with an exchange.

Important:

There is a known issue with deferred/installment billing functionality when processing a return. If you plan to use deferred/installment billing, contact customer support to determine if your planned use of this functionality will be impacted by this issue.

Deferred/Installment Billing Overview

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

There are two types of pay plans:

- **Deferred billing:** You bill the customer for the shipment after a specific number of days has passed, based on either the order date or the shipment date; or, you bill the customer on a given day of the month following the order or shipment.
- **Installment billing:** You bill the balance due for a shipment in a number of equal installment payments, which are due after specific intervals or on a given day of the month.

Different credit card types: Only credit cards (as opposed to different types such as stored value card or debit card) are eligible for deferred or installment billing. If you accept any other credit card type besides a regular credit card, you should make the Paytype one of the Qualification Values for each payment plan you create to prevent these other credit card types from being accepted. You can use the Copy option at the [Work with Flexible Payment Option Screen](#) to make a copy of the payment plan for each eligible credit card pay type.

EXC flexible payment option: The system delivers the EXC Net Billing for Exchanges flexible payment option in the [Working with Flexible Payment Options \(WFPO\)](#) menu option to use during [Credit Card Net Exchange Billing](#) (the [Use CC Net Exchange Billing \(M23\)](#) system control value is selected). You cannot change or delete this flexible payment option and you cannot use this flexible payment option for deferred/installment billing. See [Credit Card Net Exchange Billing](#) for processing details.

 Important:

There is a known issue with deferred/installment billing functionality when processing a return. If you plan to use deferred/installment billing, contact customer support to determine if your planned use of this functionality will be impacted by this issue.

In this topic:

- [Applying a Pay Plan in Order Entry](#)
 - [Selection Hierarchy](#)
 - [Demand Updates](#)
- [Pick Slip Generation](#)
- [Billing Updates](#)
 - [Deposit Release Date](#)
- [Processing Deposits](#)
- [Rejected Deposits](#)
- [Order Inquiry](#)
- [Returns](#)
 - [Netting Credits](#)
- [Reporting](#)
- [More Information](#)

Not in this topic: This topic does not include general information on setting up your company to use deferred or installment billing, or on setting up the pay plans themselves; see [Deferred/Installment Billing Setup](#). Also, see [Manage Rejected Deposits](#) in Modern View and [Printing the Deposit History Summary \(PDHS\)](#) for more information.

Examples

Pay Plan Setup	Result
Payment deferred 30 days based on invoice date	Order entered on 9/1 and shipment confirmed on 9/15. Deposit eligible for processing on 10/15.

Pay Plan Setup	Result
Payment deferred 30 days based on order date	Order entered on 9/1 and shipment confirmed on 9/15. Deposit eligible for processing on 10/1. Note: If the shipment did not take place until 10/1 or after, the deposit would be eligible for processing immediately after shipment confirmation.
Payment deferred until the 25th of the month	Order entered on 9/1 and shipment confirmed on 9/15. Deposit eligible for processing on 9/25.

Pay Plan Setup	Result
Four installments, 30 day intervals	Order entered on 9/1 for \$200.00 and shipment confirmed on 9/15. Four installments of \$50.00, eligible for processing on 9/15, 10/15, 11/14, 12/14
Six installments, 1st of the month	Order entered on 9/1 for \$300.00 and shipment confirmed on 9/15. Six installments of \$50.00, eligible for processing on 10/1, 11/1, 12/1, 1/1, 2/1, 3/1. Note: If the shipment did not take place until 10/1, the first installment would still be eligible for processing on that same date.

See [Deposit Release Date](#) for more examples.

Applying a Pay Plan in Order Entry

Determining eligible orders: In order to assign a pay plan to an order, the system must first determine if the order is eligible for a pay plan.

An order is eligible for a pay plan if the order:

- is within the pay plan's starting and ending date
- does not contain an item that is excluded from pay plans
- contains only one credit card
- has a source code that is not excluded from pay plans
- meets the minimum dollar amount requirement for the pay plan, if any
- meets the pay type requirement for the pay plan, if any
- meets the offer requirement for the pay plan, if any
- meets the item requirement for the pay plan, if any

Selection Hierarchy

Once the system determines which payment plans are eligible for the order, it determines the most appropriate plan.

The system selects the first qualifying pay plan as the primary plan based on the following hierarchy:

- The pay plan is set to apply automatically to a qualifying order.
- The pay plan is assigned to the source code on the order header.
- Selection based on the qualification values for the pay plan:

- An item on the order is the qualifying item for the pay plan and the order meets the qualifying merchandise dollar amount.
- An item on the order is the qualifying item for the pay plan but the order does not meet the qualifying merchandise dollar amount.
- The offer on the order is the qualifying offer for the pay plan and the order meets the qualifying merchandise dollar amount but does not contain the qualifying item.
- The offer on the order is the qualifying offer for the pay plan but the order does not meet the qualifying merchandise dollar amount or contain the qualifying item.
- The pay type on the order is the qualifying pay type for the pay plan and the order meets the qualifying merchandise dollar amount but does not meet any other qualifying criteria.
- The pay type on the order is the qualifying pay type for the pay plan but the order does not meet any of the other qualifying criteria.
- The order meets the qualifying merchandise dollar amount but does not meet any other qualifying criteria.

If more than one pay plan meets the same qualifications, the system then determines the primary plan as follows:

- The pay plan is the first eligible plan in descending starting date sequence (most current date), or
- The pay plan is the first alphanumerically.

Applying the plan to the order: The system can apply the pay plan to the order in three different ways, depending on how you set up the pay plan:

- Automatically apply the plan to the order, or
- Prompt the operator to select a plan, or
- Require the operator to manually assign a plan

If the pay plan is set to....	The system....
automatically apply to the order	automatically applies the pay plan to the order when you enter payment method information
prompt the operator	displays the Select Payment Plan Window pop-up window, listing eligible payment plans, where the operator can select a plan to assign to the order
not automatically apply to the order	does not automatically apply the pay plan to the order or display a pop-up window; the operator must select a pay plan for the order

Demand Updates

In addition to the standard demand updates made for every order, the system updates the following fields in the Flexible Payment Options table when you accept an order:

- Number of orders
- Dollars ordered
- Number of soldouts
- Dollars soldout

- Number of cancels
- Dollars canceled

You can review history for a pay plan by selecting History for the plan at the [Work with Flexible Payment Option Screen](#).

The system also performs updates when you confirm and ship an order containing a pay plan. See [Billing Updates](#).

Pick Slip Generation

Authorization: Unlike regular (non-pay plan) orders, deferred or installment billing orders do not automatically require an authorization for the full pickable amount of the order when you generate pick slips. The amount authorized at pick slip generation is summarized in the table:

When you print a pick slip for...	The amount authorized is...
a regular (non-pay plan) order	the full pickable amount of the order (including any tax, shipping, and charges)
a deferred billing pay plan order	one dollar, unless the Authorize full amount field for the pay plan is selected
an installment billing pay plan order	the first payment of the installment plan, unless the Authorize full amount field for the pay plan is selected

Pick messages: Any pick slip messages you have specified for the pay plan print on the customer's pick slip, provided your pick slip printing program supports it. You can enter up to three lines of messages for a pay plan.

Billing Updates

Flexible payment option: The system updates the total numbers and dollars shipped for the pay plan when you confirm shipment and bill. You can review history for a pay plan by selecting History for the plan at the [Work with Flexible Payment Option Screen](#).

Invoice: In addition to all of the standard updates that occur during billing, the system calculates the deposit release date based on the terms of the pay plan. This date, which is stored in the Invoice Pay Method, indicates when the deposit will be eligible for processing. In the case of an installment plan, the deposit release date indicates when the first installment will be eligible for processing. Each installment has a separate [Deposit Release Date](#).

Regular (non-pay plan) orders also have a deposit release date; however, it is always the same as the invoice date.

Deposit Release Date

The system assigns a deposit release date to all orders at billing. The deposit release date indicates when the deposit is eligible for processing. In the case of a regular (non-pay plan) order, the deposit release date is always the same as the invoice date, because the deposit is eligible for processing immediately. Examples of deposit release date calculation for pay plan orders are:

Pay Plan Settings	Deposit Release Date Calculation	Examples	
fixed date	Use the fixed date; however, if this date has already passed, use the invoice date	Standard calculation:	Order date = 9/1 Fixed date = 10/1 Invoice date = 9/15 Deposit release date = 10/1
		If the fixed date has already passed:	Order date = 9/1 Fixed date = 10/1 Invoice date = 10/5 Deposit release date = 10/5
number of days and order date	Add the number of days to the order date; however, if the resulting date has already passed, use the invoice date; or, if the pay plan expiration date is sooner than the resulting date, use the expiration date or invoice date (whichever is later)	Standard calculation:	Order date = 9/1 Number of days = 30 Invoice date = 9/15 Deposit release date = 10/1
		If deposit release date based on standard calculation is earlier than current (invoice) date but before the pay plan expiration date	Order date = 9/1 Number of days = 30 Invoice date = 10/5 Expiration date = 10/15 Deposit release date = 10/5
		If deposit release date based on standard calculation is later than the pay plan expiration date:	Order date = 9/1 Number of days = 30 Invoice date = 9/15 Expiration date = 9/30 Deposit release date = 9/30
number of days and invoice date	Add the number of days to the invoice date; however, if the pay plan expiration date is sooner than the resulting date, use the expiration date	Standard calculation:	Order date = 9/1 Number of days = 30 Invoice date = 9/15 Deposit release date = 10/14
		If deposit release date based on standard calculation is later than the pay plan expiration date:	Order date = 9/1 Number of days = 30 Invoice date = 9/15 Expiration date = 9/30 Deposit release date = 9/30
fixed date	Use the next occurrence of the fixed day of the month and continue on that date for the number of installments; however, if the pay plan expiration date has occurred when you bill the order, use the invoice date	Standard calculation:	Order date = 9/1 Fixed date = 10 (10th of the month) Number of installments = 4 Invoice date = 9/15 Installment deposit release dates = 10/10, 11/10, 12/10, 1/10

Pay Plan Settings	Deposit Release Date Calculation	Examples	
interval	Use the current date and add the number of interval days to each installment date to calculate the remaining installments; however, if the pay plan expiration date has occurred when you bill the order, use the invoice date	If expiration date has already occurred when you bill the order:	Order date = 9/1 Fixed date = 10 (10th of the month) Number of installments = 4 Invoice date = 9/15 Expiration date = 9/10 Deposit release date = 9/15 (no installments)
		Standard calculation:	Order date = 9/1 Interval number of days = 30 Number of installments = 4 Invoice date = 9/15 Installment deposit release dates = 9/15, 10/15, 11/14, 12/14
		If expiration date has already occurred when you bill the order:	Order date = 9/1 Interval number of days = 30 Number of installments = 4 Invoice date = 9/15 Expiration date = 9/10 Deposit release date = 9/15 (no installments)

Processing Deposits

Authorization required: Unlike a regular (non-pay plan) credit card order, a pay plan order might not have a full, valid authorization at the time you process the deposit. Regular orders normally receive a full authorization at the time you generate the pick slip, and deposit processing normally occurs soon enough after pick slip generation for the authorization to still be valid. However, deposits for pay plan orders occur at intervals after pick slip generation, and authorizations from that time may no longer be valid, or may have been for less than the full deposit amount. See [Pick Slip Generation](#).

Action codes: The system sends an action code of B to the deposit service for any pay plan deposits that require authorization. The conditions under which the system sends an action code of B are described in Processing Auto Deposits (SDEP).

Force deposit: If a pay plan deposit fails authorization, the system will “force” the deposit if you have set up the vendor response code to do so. Forcing a deposit means that the system performs all the same updates as if the authorization had been approved. For example, the invoice payment method for the order will be updated, and the deposit will not be included on reports that list unconfirmed deposits, or be available through the Resubmit Rejected Deposits function.

Rejected Deposits

Overview: Rejected or unconfirmed deposits appear on the Unconfirmed Deposits Listing when you process deposits. You can use the [Resubmit Rejected Deposits Screen](#) to work with these deposits, including:

- changing the credit card number or the deposit release date
- writing off or deleting the deposit

- entering a cash payment amount
- confirming the deposit interactively
- reviewing deposit history

You can also work with rejected deposits through standard order inquiry. See [Order Inquiry](#).

Order Inquiry

Purpose: Use standard order inquiry to review information associated with a pay plan. The information and options listed below are not available in streamlined order inquiry.

- the total amount to deposit, the amount deposited, and the remaining amount to deposit
- credit card information
- the deposit release date
- installment schedule if the order uses an installment pay plan, such as:
 - the total number of installments
 - the number of installments remaining to deposit
 - the installment interval
 - the fixed installment day
 - the installment amount
- rejected deposit amount
- prepaid amount

Change options: You can also change this information related to the invoice payment method:

- the deposit release date
- installment information, such as:
 - the number of remaining installments
 - the installment interval
 - the fixed installment day
- the prepaid check or cash amount
- credit card information, such as:
 - the pay type
 - the credit card number
 - the credit card's expiration date
 - the authorization number
 - the authorization date

Rejected deposit options: If the invoice payment method is associated with a rejected deposit amount, you can perform the following updates through order inquiry:

- resubmit the rejected deposit
- write off the remaining amount to deposit for the invoice or write off a specified amount
- delete the rejected deposit

Deposit history: You can also review invoice deposit attempts and responses for each invoice payment method in order inquiry. Deposit history includes whether the invoice was associated with a pay plan, the deposit amount, and the response code received from the deposit service.

Order payment history: The system records messages describing invoice activity associated with the order payment method or invoice payment method, such as:

- deposits made
- invoices netted against each other
- changes made in order inquiry
- when a pay type is deactivated
- when you add, change, or delete the pay plan associated with the payment type on the order

Returns

Purpose: When you perform a return against an order containing a payment plan, the system does not credit a customer's credit card until a deposit amount equal to or greater than the credit amount has been processed. This check ensures that the customer does not receive a credit for the return before paying for the shipment.

For deferred payment plans, the system processes the credit invoice after the debit invoice has been deposited.

For installment payment plans, the system processes the credit invoice once the debit invoice amount deposited is equal to or greater than the credit invoice amount.

Netting Credits

You can net credit invoices against debit invoices before processing the deposit on a pay plan order. The [Net Credit Card Credits for Deferred and Installment Billing \(F55\)](#) system control value controls whether you net credits.

If you net credits:

- For deferred payment plans, the system subtracts the credit invoice amount from the debit invoice amount and sends only the net amount to the service bureau for deposit.
- For installment payment plans, the system subtracts the credit invoice amount from the debit invoice amount. The system then divides the remaining amount to deposit for the debit invoice by the number of remaining installments to determine the amount due for each remaining installment.

If you do not net credits, each credit deposit is processed separately from the related debit deposit.

See [Processing Auto Deposits \(SDEP\)](#) for more information on netting credits and examples.

Deposit release date: A credit invoice uses the deposit release date from the original (debit) invoice as long as that date is not earlier than the current date. If the deposit release date of the original invoice is earlier than the current date, the credit invoice uses the current date. This date assignment ensures that the customer is not credited until the deposit is processed; but if the customer has been billed, the credit will be released immediately.

Reporting

Related reports: The following reports may be useful in reviewing pay plan activity and status:

- [Sales Journal by Pay Type](#) (fast path = PSJP): breaks out totals billed by date, including deferred, installment, and regular (non-pay plan) orders for each pay type
- [Deposit History Summary Report](#) (fast path = PDHS): breaks out totals deposited by date, including deferred, installment, and regular (non-pay plan) orders
- [Credit Card Deposit Schedule](#) (fast path = PCCD): lists the pay plan totals scheduled for deposit for a range of dates
- [Pending Payment Plan Deposits Report](#) (fast path = PP, PD): lists pending pay plan orders for a range of invoice dates
- [Deposit History Detail Report](#) (fast path = PDHD): lists deposits processed during a specific date range. Within this date range, you can select to include only deposits for a specific authorization service, pay type, and status.

Additionally, the Submit Auto Deposits menu option produces the following reports:

- [Unconfirmed Deposits Listing Report](#): lists each deposit that was not confirmed and processed, breaking out totals by deferred, installment, and regular (non-pay plan) invoices
- [Auto Deposit Confirmation Report](#): breaks out totals sent and confirmed by deferred, installment, and regular (non-pay plan) orders for each pay type

More Information

Related to pay plans:

See	For information on...
Establishing Order Hold Reason Codes (WOHR)	Setting up order hold reason codes related to pay plans
Using the Order Inquiry Scan Screens (OIOM)	The screens you can use to review financial information on an order related to pay plans or to make changes to pay plan information in order inquiry
Introducing Order Maintenance	The changes you can make in order maintenance related to pay plans
Order Status and Activity Reports	Pay plan information on the Sales Journal by Pay Type
Setting Up Order Entry Values	System control values related to pay plans
Setting Up Secured Features	Secured features related to pay plans
Working with Source Codes (WSRC)	Assigning a pay plan to a source code
Performing Initial Item Entry (MITM)	Restricting an item from pay plans
Entering Orders	Entering orders for pay plans

See	For information on...
Working with the BILL_ASYNC Job	billing updates
Working with the ORDR_ASYNC Job	order updates
Setting Up Authorization Services	authorization and deposit services
Deferred/Installment Billing Setup	setup related to pay plans
Working with Flexible Payment Options (WFPO)	setting up the pay plans themselves
Processing Deposits	processing deposits, handling rejected deposits, and reports related to pay plans

Deferred/Installment Billing Setup

Purpose: Before you can use deferred or installment billing pay plans in your company, you must perform the necessary setup. Information requiring creation and setup includes:

- system control values
- secured features
- authorization service settings, including response codes and currency codes
- order hold reason codes
- source codes that point to specific pay plans
- items that would be exempt from pay plans

Set up pay plans: Additionally, you must set up the pay plans themselves using the [Work with Flexible Payment Option Screen](#).

EXC flexible payment option: The system delivers the EXC Net Billing for Exchanges flexible payment option in the [Working with Flexible Payment Options \(WFPO\)](#) menu option to use during [Credit Card Net Exchange Billing](#) (the [Use CC Net Exchange Billing \(M23\)](#) system control value is selected). You cannot change or delete this flexible payment option and you cannot use this flexible payment option for deferred/installment billing. See [Credit Card Net Exchange Billing](#) for processing details.

In this topic:

- [System Control Values](#)
- [Secured Features](#)
- [Authorization Service Settings](#)
- [Order Hold Reason Codes](#)
- [Additional and Recommended Setup](#)

System Control Values

System Control Value	Description
Deferred and Installment Billing (F51)	Select this field to be able to apply pay plans to orders. If this field is unselected, you will not be able to apply pay plans in order entry or order maintenance.
Number of Times Flexible Payment Option is Used (F52)	Enter the number of times the same credit card number can be applied against a pay plan order before being evaluated for PV hold. This system control value works together with the Number of Days Flexible Payment Option is Used (F53) field, below.

System Control Value	Description
Number of Days Flexible Payment Option is Used (F53)	Enter the number of days the system should use for evaluating a credit card against the Number of Times Flexible Payment Option is Used (F52) field, above. If the same credit card number appears on orders more than the specified number of times within this number of days, the order goes on PV hold. Example: You set the Number of Times Flexible Payment Option is Used (F52) field to 5, and the Number of Days Flexible Payment Option is Used (F53) field to 14. If the same credit card number appears on pay plan orders more than 5 times in 14 days, the sixth and subsequent orders for the credit card go on PV hold.
Dollar Threshold for Sold To Customer Orders with Flexible Payments (F54)	Enter the total dollar amount a customer can have in pay plan orders before the system puts new orders on \$P hold. Example: You set this field to 500.00. If a customer has 3 pay plan orders for a total of \$450.00, and you take a new pay plan order for \$75.00, the new order goes on \$P hold.



Note:

You must also create the [Order Hold Reason Codes](#).

Each of these fields is available at the Edit Deferred/Installment Billing screen.

Secured Features

Secured Feature	Description
Override Deferred and Installment Billing Options (A81)	Controls the ability to select a pay plan other than the primary, system-selected plan in order entry
Change Invoice Payment Information (A82)	Controls the ability to change information on an invoice once the order has been billed but before the invoice amount is fully deposited. The Change Invoice Pay Method Screen allows you to change the deposit release date, credit card information, the number of remaining installments; apply a cash payment; or writeoff, resubmit, or delete the deposit. This screen is available in order inquiry and Submit Rejected Deposits.

Authorization Service Settings

When you are setting up an authorization service that supports deferred/installment billing, please note the following additional required settings:

- Industry code: enter your DBA number
- Deferred merchant ID
- Installment merchant ID

- Exclude from FPO: unselected
- Pay type cross reference Paytypes at the [Work with Authorization Services Screen](#)): Create a cross-reference for each pay type code you will allow on pay plan orders, using the vendor pay code information supplied by the authorization service.
- Currency cross reference (Currency at the [Work with Authorization Services Screen](#)): Create a cross-reference for each currency code you will use on pay plan orders, using the vendor currency code information supplied by the authorization service.
- Vendor responses (Responses at the [Work with Authorization Services Screen](#)): Optionally, you can select the Force deposit for FPO field.

You can also set up merchant ID overrides by entity.

Pay types: Each pay type eligible for deferred or installment billing should have the authorization service set up as its authorization and deposit service.

More information: See [Working with Currency \(WCUR\)](#) for more information on setting up pay types or currency codes.

Order Hold Reason Codes

The order hold reason codes you should set up in [Establishing Order Hold Reason Codes \(WOHR\)](#) as part of credit checking pay plan orders are described in this table:

Hold Reason Code	Used When...
P\$	You enter an order that makes the sold to customer's total undeposited pay plan orders exceeds the amount specified in the Dollar Threshold for Sold To Customer Orders with Flexible Payments (F54) system control value; see System Control Values for an example.
PV	You enter an order that makes the sold to customer's total pay plan orders exceed the limit specified in the Number of Times Flexible Payment Option is Used (F52) system control value, for the period specified in the Number of Days Flexible Payment Option is Used (F53) system control value; see System Control Values for an example.
SB	Any open orders for the same sold to customer are put on hold because a deposit for this customer was rejected at the Auto Deposit Screen .
CB	Any open orders for the same credit card number are put on hold because a deposit for this credit card number was rejected at the Auto Deposit Screen .

Additional and Recommended Setup

Optionally, you can set up the fields described below for use in deferred or installment pay plans.

Source code: You can use the following fields to control how pay plans apply in order entry if this source code is on the order header:

- Flex pay code: If you enter a pay plan code, it gives the pay plan priority in the evaluation hierarchy the system uses when selecting the plans that apply to an order.
- Exclude FPO: If you select this field, orders for this source code are excluded from pay plans.

See [Working with Source Codes \(WSRC\)](#) for more information on setting up source codes.

Item: Select the Exclude FPO field to exclude any order containing the item from pay plans.

See [Performing Initial Item Entry \(MITM\)](#) for more information on setting up items.

Consolidate invoice: Selecting the [Consolidated Invoice \(B49\)](#) system control value if you use deferred or installment billing will simplify pay plan management considerably by limiting the number of invoices for an order.

 Note:

In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date.

Pay plan settings: Using the following settings for each pay plan you create will simplify pay plan management:

- **Auto apply:** Set this field alike for all pay plans that might apply to an order to simplify the pay plan selection hierarchy in order entry.
- **Ship complete:** Select this field to simplify pay plan management by limiting the number of invoices for an order.

See [Working with Flexible Payment Options \(WFPO\)](#).

Pay type setting for CyberSource: Use the Notify of installment setting for the payment method to control whether to send a commerceIndicator set to install in the subsequent authorization and deposit request to CyberSource for an order using a deferred or installment pay plan, or to have the information passed in the ccAuthService element similar to other subsequent authorizations, such as a split shipment.

For more information: See [Working with Pay Types \(WPAY\)](#) for more information on setting up pay types.

 Important:

In order to determine how to set this flag if you offer deferred or installment billing and use CyberSource, you need to confirm the information required by the end processor for deferred or installment payment plans for each payment type.

Credit Card Net Exchange Billing

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

Examples of net exchange billing: The remaining amount after the system performs credit card netting determines whether the system charges or credits the customer's credit card.

Type of Exchange	Example
Even exchange	Credit invoice for returned item = \$50.00 Debit invoice for exchange item = \$50.00 During deposits, the system nets the credit invoice containing the returned item against the debit invoice containing the exchange item to determine the remaining amount to deposit: 50.00 debit - 50.00 credit = 0.00 balance The system does not charge or credit the customer's credit card. See CC Net Example: Even Exchange for more details.
Uneven exchange for less expensive item	Credit invoice for returned item = \$100.00 Debit invoice for exchange item = \$60.00 During deposits, the system nets the credit invoice containing the returned item against the debit invoice containing the exchange item to determine the remaining amount to deposit: 100.00 credit - 60.00 debit = 40.00 credit The system credits the customer's credit card \$40.00. See CC Net Example: Uneven Exchange for Less Expensive Item for more details.
Uneven exchange for more expensive item	Credit invoice for returned item = \$100.00 Debit invoice for exchange item = \$140.00 During deposits, the system nets the credit invoice containing the returned item against the debit invoice containing the exchange item to determine the remaining amount to deposit: 140.00 debit - 100.00 credit = 40.00 debit The system charges the customer's credit card \$40.00. See CC Net Example: Uneven Exchange for More Expensive Item for more details.

Eligible orders: An order is eligible for net exchange billing if:

- the [Use CC Net Exchange Billing \(M23\)](#) system control value is selected, and
- the [Hold Days for CC Netting \(M24\)](#) is set to a number greater than 0, and
- the order contains a credit card pay type, and
- a deferred or installment pay plan has not already been assigned to the credit card pay type on the order (see [Deferred/Installment Billing Overview](#)).

Accepting an exchange transaction on an order eligible for net exchange billing: When you accept an exchange transaction on an order eligible for net exchange billing, the system:

- updates the ODT Seq # field in the RA Exchange Item table with the order detail sequence number of the exchange item added to the order in order to link the exchange item to the associated returned item.
- creates a manual authorization for the return amount, using the authorization code defined in the [Default Auth Code for CC Netting \(M25\)](#) system control value. The expiration date for the manual authorization is based on the Reauthorization days defined for the credit card pay type.
- places the associated refund on hold and updates the Hold until date based on the # of days for deferral defined for the EXC deferred payment option. The system holds the refund for this number of days to allow time for the system to net the credit invoice containing the return item against the debit invoice containing the exchange item.

Billing an exchange transaction flagged for net exchange billing: When the exchange transaction is processed through billing, the system:

- creates the credit invoice and assigns the EXC deferred payment option to the invoice. The system considers a credit invoice pending net exchange billing if the Invoice Payment Method record contains the EXC deferred payment option code in the FPO Payment Code and the credit invoice has not yet been deposited (the Deposit created date for the Invoice Payment Method record is blank).
- updates the Deposit Release Date for the Invoice Payment Method record for the credit invoice with the calculated release date using the current date + the # of days for deferral defined for the EXC payment option. The deposit release date indicates when the deposit is eligible for processing; the system will not process the credit invoice until its deposit release date has been reached.

Reviewing the order in Order Inquiry: When reviewing orders flagged for net exchange billing:

- EXC displays under the Line # field on the [Order Inquiry Detail Screen](#) for the order detail line that contains the return item to indicate the returned item is associated with an exchange item. **Note:** The system identifies the order detail line that contains the exchange item by the associated Order Line History record that contains the exchange reason code. You can review order line history on the [Display Order Line History Screen](#).
- the Net Bill field on the [Display Invoices Screen](#) for the credit invoice displays an asterisk, indicating the credit invoice is currently pending for net exchange billing. The system considers a credit invoice pending for credit card net exchange billing if the Invoice Payment Method record contains the EXC deferred payment option code in the IPM FPO Payment Code and the credit invoice has not yet been deposited (the IPM Deposit created date is blank).

Reviewing the refund: When reviewing refunds flagged for net exchange billing:

- the Net field on the [Work with Refunds Screen](#) and [Work with Refunds By Order# Screen](#) displays an asterisk for a refund that is pending net exchange billing.
- the text *NET BILLING displays next to the Amount field on the [Change Refund Screen](#) and Display Refund screen.
- the system prevents you from changing the pay type of the refund to another pay type (the Pay type field on the Change Refund screen is display-only).
- the [Refund Due List by Type](#) and the [Refund Due List by Order #](#) reports display an asterisk after the amount if the refund has been flagged for net exchange billing.

Generating a pick for the exchange item: During pick slip generation for the exchange item, the system applies the manual authorization to the shippable amount and performs batch authorization for any remaining balance due.

Shipping and billing the exchange item: When the shipment for the exchange item is processed through billing, the system:

- creates the debit invoice for the exchange item and assigns the EXC deferred payment option to the invoice.
- updates the Invoice Payment Method record for the debit invoice:
 - the IPM Auth # contains the authorization code defined in the Default Auth Code for CC Netting (M25) system control value.
 - the IPM Auth Date and IPM Deposit Release Date contain the current date.
- updates the IPM Deposit Release Date for the credit invoice flagged for net exchange billing to the current date, releasing the credit invoice for netting.

- processes the refund, even if the Hold until date for the refund has not been reached. However, the system does not print or email the credit card credit acknowledgment for the refund until the next time you run process refunds.
- updates the Pay Plan Code field for the credit card pay type on the [Display Order Pay Type Screen \(2 of 2\)](#) with the EXC deferred flexible payment option.

Processing deposits: When you process deposits, the system nets the credit invoice containing the return item against the debit invoice containing the exchange item.

- If the net difference is a credit, the system sends the credit invoice to the service bureau for settlement in order to refund the customer's credit card the net amount.
- If the net difference is a debit, the system sends the debit invoice to the service bureau for settlement in order to charge the customer's credit card the net amount.
- If the net difference is zero, the system does not send any invoice amount to the service bureau for settlement. No amount is applied to the customer's credit card.

Processing refunds: When you process refunds, the system defers the printing and emailing of credit card credit acknowledgments associated with refunds flagged for net exchange billing until the system nets the credit invoice containing the return item against the debit invoice containing the exchange item.

Once netting is performed, the system prints and emails credit card credit acknowledgments for refunds flagged for net exchange billing the next time you run process refunds. In addition, the [Credit Card Credit Register](#) displays an asterisk after the refund amount if the refund is flagged for net exchange billing.

The [Display Refunds for Order Screen](#) displays the amount of the refund that was processed.

- If the net difference is a debit, the refund amount updates to .00.
- If the net difference is a credit, the refund amount updates to the net credit amount.
- If the net difference is zero, the refund amount updates to .00.

Reviewing order transaction history: The system creates the following Order Transaction History records during the net exchange process to help you understand the updates that have taken place. You can view these messages on the [Display Order History Screen](#).

When the exchange transaction is accepted and processed through billing, the system creates records similar to the following:

Type	Transaction Note	Amt	User
RTN AUTH	RA Credit pending processing	100.00	TBROWN
AUTH	MANUAL AUTH# DETECTED - CCNET	100.00	AUTH
SHIPMENT	CREDIT BILLED ON INVOICE# 0001014	100.00-	TBROWN

When you ship and bill the exchange item, the system creates records similar to the following:

Type	Transaction Note	Amt	User
REFUND	CC Crd for inv# 1014 processed-deferred	100.00	your default user
SHIPMENT	Pick# 0003977 Billed on Invoice# 0001015	60.00	TBROWN

When you process deposits, the system creates a record similar to the following:

Type	Transaction Note	Amt	User
REFUND	Refund amount netted to -40.00		TBROWN

Reviewing order payment history: The system creates the following Order Payment History records during the net exchange process to help you understand the updates that have taken place. You can view these messages on the [Display Order Payment History Screen](#).

When the exchange transaction is accepted, the system creates records similar to the following:

Type	Note	Inv	User
B	Inv# 1014 created for \$100.00-	1014	TBROWN
B	with a deposit release date of 20815.	1014	TBROWN

When you ship and bill the exchange item, the system creates records similar to the following:

Type	Note	Inv	User
B	Inv# 1015 created for \$60.00	1015	TBROWN
B	with a deposit release date of 12915.	1015	TBROWN

When you process deposits, the system creates records similar to the following:

Type	Note	Inv	User
N	Pend Dep of \$60.00 on INV1015 netted	1015	TBROWN
N	against CRD1014 reducing to \$40.00-.	1015	TBROWN
N	Pend Dep of \$60.00 on INV1015 netted	1014	TBROWN
N	against CRD1014 reducing to \$40.00-.	1014	TBROWN
D	Deposit confirmed \$ 40.00-.	1014	TBROWN

Net exchange billing considerations:

- An order is not eligible for net exchange billing if:
 - you return an item and then manually add an exchange item to the order.
 - the exchange item is soldout.

In these situations, the system does not link the exchange item with the return item and processes the return and exchange separately.

- If you cancel the exchange item, the system does not perform net exchange billing and credits the customer's credit card for the amount of the return.

- If the manual authorization created for the return amount expires before the exchange item is shipped and billed, the system performs batch authorization during pick slip generation and continues to hold the credit invoice and refund in order to perform net exchange billing during deposits.
- Regardless of whether you consolidate invoices, the system flags all credit and debit invoices associated with the return and exchange transaction for net exchange billing. See the following for examples:
 - [CC Net Example: Uneven Exchange for Less Expensive Item Plus Ship Alone Item; Invoices Not Consolidated](#)
 - [CC Net Example: Uneven Exchange for Less Expensive Item Plus Ship Alone Item; Invoices Consolidated](#)
 - [CC Net Example: Uneven Exchange for More Expensive Item Plus Ship Alone Item; Invoices Not Consolidated](#)
 - [CC Net Example: Uneven Exchange for More Expensive Item Plus Ship Alone Item; Invoices Consolidated](#)
- If the order contains more than one credit card, the system includes both credit cards in the net exchange process.
- If an item on the order is shipped and billed on the same day as the exchange item, the system includes the amount of the additional item in the net exchange process. See [CC Net Example: Even Exchange Plus Additional Item](#) for an example.

In this topic:

- [Credit Card Net Exchange Setup](#)
- [Credit Card Net Exchange Examples](#)

Credit Card Net Exchange Setup

Before you can use credit card net exchange billing, you must complete the required setup. Information requiring setup includes:

- [System Control Values for Credit Card Net Exchange Billing](#)
- [EXC Net Billing for Exchanges Flexible Payment Option](#)
- [Credit Card Net Exchange Edit in Work with Pay Types \(WPAY\)](#)

System Control Values for Credit Card Net Exchange Billing

System Control Value	Description
Use CC Net Exchange Billing (M23)	Select this system control value if you want the system to net credit invoices with debit invoices before a deposit is sent to the service bureau for an invoice associated with an exchange.
Hold Days for CC Netting (M24)	Enter the number of days the system holds debit and credit invoices for credit card net exchange billing. The system updates the # of days for deferral field for the EXC Net Billing for Exchanges flexible payment option record with this number. Any existing refunds and Invoice Payment Method records are not updated with the new hold days. Note: Net exchange billing does not work unless this system control value is set to a number greater than 0.

System Control Value	Description
Default Auth Code for CC Netting (M25)	Enter the authorization code the system uses when creating a manual authorization to allow for the netting of invoices during the credit card net exchange process.
Preload Deposits (L78)	Deselect this system control value if the Use CC Net Exchange Billing (M23) system control value is selected. You cannot use preload deposit processing if you are using Credit Card Net Exchange Billing.

EXC Net Billing for Exchanges Flexible Payment Option

The system creates the EXC Net Billing for Exchanges flexible payment option automatically if you select the Use CC Net Exchange Billing (M23) system control value for use during the Credit Card Net Exchange process. You cannot change or delete this flexible payment option or use this flexible payment option for deferred/installment billing. The default settings for the EXC flexible payment option are described below; see [Working with Flexible Payment Options \(WFPO\)](#) for more information on flexible payment options.

This flexible payment option is deleted automatically if you deselect the Use CC Net Exchange Billing (M23) system control value.

Field	Description
Payment Code	Delivered as EXC.
Description	Delivered as Net Billing for Exchanges.
Type	Delivered as Deferred, indicating the system defers depositing the amount the customer owes for an order shipment for a specified period of time.
Start	Does not apply to net exchange billing.
End	Does not apply to net exchange billing.
Expiration Date	Does not apply to net exchange billing.
View in OE/OM	Delivered as unselected, since the EXC Net Billing for Exchanges flexible payment option is not an available selection during deferred/installment billing.
Restrict to entity	Delivered as 0, indicating the flexible payment option is not restricted to a specific entity.
Auth full amount	Delivered as unselected since this field is not used during the credit card net exchange process.
Merchant ID Message	Delivered blank since this field is not used during the credit card net exchange process.
Ship Complete	Delivered as unselected since this field is not used during the credit card net exchange process.
Display Summary	Delivered as unselected since this field is not used during the credit card net exchange process.
Auto apply	Delivered as No auto apply since this field is not used during the credit card net exchange process.
Validate CC ext dt	Delivered as unselected since this field is not used during the credit card net exchange process.
Pick Message	Delivered blank since this field is not used during the credit card net exchange process.
Deferred Values	

Field	Description
# of days for deferral	Delivered as 0. The system updates this field with the number of days you enter in the Hold Days for CC Netting (M24) system control value. This is the number of days the system holds debit and credit invoices for credit card net exchange billing. The system also uses this number to determine the manual authorization date during Credit Card Net Exchange Billing.
Based On	Delivered as Invoice Dt, indicating the system uses the invoice (billing) date and # of days for deferral field to calculate the deposit date.
Fixed deferral date	Delivered as 0 since this field is not used during the credit card net exchange process.
Installment Values	The # Of Installments, Interval, and Fixed Installment day fields are set to 0 for the EXC flexible payment option.
Qualification Values	The Offer and Item fields are blank and the Minimum Amt and Pay Type fields are set to 0 for the EXC flexible payment option.

Credit Card Net Exchange Edit in Work with Pay Types (WPAY)

If the Use CC Net Exchange Billing (M23) system control value is selected, you cannot define an Alternate refund type or Alternate refund category for a Credit Card Pay type category pay type; the system displays an error message: Alt refund type/category not allowed with CC Net Exchange Billing.

Also, if an alternate refund type or alternate refund category is defined for an existing pay type, the system will ignore the alternate refund values and instead perform credit card net exchange billing for eligible orders.

Credit Card Net Exchange Examples

- CC Net Example: Even Exchange
- [CC Net Example: Even Exchange Plus Additional Item](#)
- CC Net Example: Uneven Exchange for Less Expensive Item
- [CC Net Example: Uneven Exchange for Less Expensive Item Plus Ship Alone Item; Invoices Not Consolidated](#)
- [CC Net Example: Uneven Exchange for Less Expensive Item Plus Ship Alone Item; Invoices Consolidated](#)
- CC Net Example: Uneven Exchange for More Expensive Item
- [CC Net Example: Uneven Exchange for More Expensive Item Plus Ship Alone Item; Invoices Not Consolidated](#)
- [CC Net Example: Uneven Exchange for More Expensive Item Plus Ship Alone Item; Invoices Consolidated](#)

CC Net Example: Even Exchange

The system performs the following steps during credit card net exchange processing when the returned item is the same price as the exchange item. In this example, no other items besides the exchange item are added to the order.

#	Step
1.	The customer places an order for an item for \$100.00. The item is picked, shipped, and billed. The order is processed through deposits.
2.	The customer returns the item for \$100.00 to exchange it for another item for the same price (\$100.00). The exchange item is in-stock and reserved on the order. The customer also adds another item for \$30.00 to the order.
3.	When the return and exchange transaction is accepted and billed, the system: - updates the ODT Seq # field in the RA Exchange Item table with the order detail sequence number of the exchange item added to the order. - creates a manual authorization for the return amount (\$100.00) using the authorization code defined in the Default Auth Code for CC Netting (M25) system control value. The expiration date for the manual authorization is based on the Reauthorization days defined for the credit card pay type. - creates a refund for \$100.00 in a held status and updates the Hold until date with the calculated hold days using the current date + the # of days for deferral defined for the EXC flexible payment option. - creates a credit invoice for the returned item for \$100.00 and updates the Invoice Payment Method record for the credit invoice: - the FPO Payment Code contains the EXC flexible payment option code. - the Deposit Release Date is calculated using the current date + the # of days for deferral defined for the EXC flexible payment option. - creates the following Order Transaction History records that you can view on the Display Order History screen: <pre> RTN AUTH RA Credit pending processing 100.00 KBROWN AUTH MANUAL AUTH# DETECTED - CCNET 100.00 OEPICKAUTH SHIPMENT CREDIT BILLED ON INVOICE# 0001011 100.00- KBROWN </pre> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> B Inv# 1011 created for \$100.00- 1011 KBROWN B with a deposit release date of 20715 1011 KBROWN </pre>
4.	You run pick slip generation for the exchange item.

#	Step
5	You ship and bill the exchange item and additional item. The system: - creates a debit invoice for \$100.00 for the exchange item and updates the Invoice Payment Method record for the debit invoice: - the IPM Auth # contains the authorization code defined in the Default Auth Code for CC Netting (M25) system control value. - the IPM Auth Date contains the current date. - the IPM FPO Payment Code field contains the EXC flexible payment option code. - the IPM Deposit Release Date contains the current date. - releases the credit invoice for netting, updating the IPM Deposit Release Date to the current date. - processes the refund. However, the system does not print or email the credit card credit acknowledgment for the refund until the next time you run process refunds. - updates the Pay Plan Code field for the credit card pay type on the Display Order Pay Type 2 screen with the EXC flexible payment option code. - creates the following Order Transaction History records that you can view on the Display Order History screen: <pre> REFUND CC Crd for inv# 1011 processed-deferred 100.00 your default user SHIPMENT Pick# 0003974 Billed on Invoice# 0001012 100.00 KBROWN </pre> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> B Inv# 1012 created for \$100.00 1012 KBROWN B with a deposit release date of 12815 1012 KBROWN </pre>

#	Step
6	You process deposits. The system: • nets the credit invoice containing the return item with the debit invoice containing the exchange item. In this example, the net difference is zero. No funds are credited or deposited. – For the credit invoice that contains the returned item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to -100.00. The Deposit To Date field remains blank since no amount was deposited for the credit invoice. – For the debit invoice that contains the exchange item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to 100.00. The Deposit To Date field remains blank since no amount was deposited for the debit invoice. • updates the Refund amount on the Display Refunds for Order Screen to .00. • creates the following Order Transaction History record that you can view on the Display Order History screen: <pre> REFUND Refund amount netted to 0.00 KBROWN </pre> • creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> N Pend Dep of \$100.00 on CRD1011 netted 1011 KBROWN N against INV1012 reducing to \$00.00. 1011 KBROWN N Pend Dep of \$100.00 on CRD1011 netted 1012 KBROWN N against INV1012 reducing to \$00.00. 1012 KBROWN </pre>

CC Net Example: Even Exchange Plus Additional Item

The system performs the following steps during credit card net exchange processing when the returned item is the same price as the exchange item. In this example, an additional item for \$30.00 is added to the order.

#	Step
1.	The customer places an order for an item for \$100.00. The item is picked, shipped, and billed. The order is processed through deposits.
2.	The customer returns the item for \$100.00 to exchange it for another item for the same price (\$100.00). The exchange item is in-stock and reserved on the order. The customer also adds another item for \$30.00 to the order.

#	Step
3	When the return and exchange transaction is accepted and billed, the system: • updates the ODT Seq # field in the RA Exchange Item table with the order detail sequence number of the exchange item added to the order. • creates a refund for \$100.00 in a held status and updates the Hold until date with the calculated hold days using the current date + the # of days for deferral defined for the EXC flexible payment option. • creates a credit invoice for the returned item for \$100.00 and updates the Invoice Payment Method record for the credit invoice: – the IPM FPO Payment Code field contains the EXC flexible payment option code. – the IPM Deposit Release Date is calculated using the current date + the # of days for deferral defined for the EXC flexible payment option. • creates the following Order Transaction History records that you can view on the Display Order History screen: <pre>RTN AUTH RA Credit pending processing 100.00 KBROWN MAINT Order was maintained 130.00 KBROWN SHIPMENT CREDIT BILLED ON INVOICE# 0001033 100.00- KBROWN</pre> • creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre>B Inv# 1033 created for \$100.00- 1033 KBROWN B with a deposit release date of 30115 1033 KBROWN</pre>
4	You run pick slip generation for the exchange item and additional item. The system: • creates a manual authorization for the return amount (\$100.00) using the authorization number defined in the Default Auth Code for CC Netting (M25) system control value. The authorization date is the current date and the expiration date for the manual authorization is based on the Reauthorization days defined for the credit card pay type. • performs batch authorization for the additional item (\$30.00) added to the order. • creates the following Order Transaction History record that you can view on the Display Order History screen: <pre>AUTH MANUAL AUTH# DETECTED - CCNET 100.00 AUTH</pre>

#	Step
5	You ship and bill the exchange item and additional item. The system: - creates a debit invoice for \$130.00 for the exchange item (\$100.00) and the additional item (\$30.00). The system also updates the Invoice Payment Method record for the debit invoice: - the IPM Auth # contains the authorization code defined in the Default Auth Code for CC Netting (M25) system control value. - the IPM Auth Date contains the current date. - the IPM FPO Payment Code field contains the EXC Net Billing for Exchanges flexible payment option code. - the IPM Deposit Release Date contains the current date. - releases the credit invoice for netting, updating the IPM Deposit Release Date to the current date. - processes the refund. However, the system does not print or email the credit card credit acknowledgment for the refund until the next time you run process refunds. - updates the Pay Plan Code field for the credit card pay type on the Display Order Pay Type 2 screen with the EXC flexible payment option code. - creates the following Order Transaction History records that you can view on the Display Order History screen: <pre>REFUND CC Crd for inv# 1033 processed-deferred 100.00 your default user SHIPMENT Pick# 0004031 Billed on Invoice# 0001034 130.00 KBROWN</pre> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre>B Inv# 1034 created for \$130.00 1034 KBROWN with a deposit release date of 21915 1034 KBROWN</pre>

#	Step
6	You process deposits. The system: • nets the credit invoice containing the return item with the debit invoice containing the exchange item. In this example, the net difference is \$30.00 for the additional item added to the order. The system processes the debit invoice for \$30.00. – For the credit invoice that contains the returned item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to -100.00. The Deposit To Date field remains blank since no amount was deposited for the credit invoice. – For the debit invoice that contains the exchange item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to 130.00. The Deposit To Date field updates to 30.00. • updates the Refund amount on the Display Refunds for Order Screen to .00. • creates the following Order Transaction History record that you can view on the Display Order History screen: <pre> REFUND Refund amount netted to 0.00 KBROWN </pre> • creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> N Pend Dep of \$100.00 on CRD1033 netted 1033 KBROWN N against INV1034 reducing to \$30.00. 1033 KBROWN N Pend Dep of \$100.00 on CRD1033 netted 1034 KBROWN N against INV1034 reducing to \$30.00. 1034 KBROWN D Deposit confirmed \$ 30.00 1034 KBROWN </pre>

CC Net Example: Uneven Exchange for Less Expensive Item

The system performs the following steps during credit card net exchange processing when the exchange item is less expensive than the return item. In this example, no other items besides the exchange item are added to the order.

#	Step
1.	The customer places an order for an item for \$100.00. The item is picked, shipped, and billed. The order is processed through deposits.
2.	The customer returns the item for \$100.00 to exchange it for a less expensive item (\$60.00).

#	Step
3	When the return and exchange transaction is accepted and billed, the system - updates the ODT Seq # field in the RA Exchange Item table with the order detail sequence number of the exchange item added to the order. - creates a manual authorization for the return amount (\$100.00) using the authorization number defined in the Default Auth Code for CC Netting (M25) system control value. The expiration date for the manual authorization is based on the Reauthorization days defined for the credit card pay type. - creates a refund for \$100.00 in a held status and updates the Hold until date with the calculated hold days using the current date + the # of days for deferral defined for the EXC flexible payment option. - creates a credit invoice for the returned item for \$100.00 and updates the Invoice Payment Method record for the credit invoice: - the IPM FPO Payment Code field contains the EXC flexible payment option code. - the IPM Deposit Release Date is calculated using the current date + the # of days for deferral defined for the EXC flexible payment option. - creates the following Order Transaction History records that you can view on the Display Order History screen: <pre> RTN AUTH RA Credit pending processing 100.00 KBROWN MAINT Order was maintained 60.00 KBROWN AUTH MANUAL AUTH# DETECTED - CCNET 100.00 OEPICKAUTH SHIPMENT CREDIT BILLED ON INVOICE# 0001036. 100.00- KBROWN </pre> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> B Inv# 1036 created for \$100.00- 1036 KBROWN B with a deposit release date of 30115. 1036 KBROWN </pre>
4	You run pick slip generation for the exchange item

#	Step
5	You ship and bill the exchange item and additional item. The system: - creates a debit invoice for \$60.00 for the exchange item. The system also updates the Invoice Payment Method record for the debit invoice: - the IPM Auth # contains the authorization code defined in the Default Auth Code for CC Netting (M25) system control value. - the IPM Auth Date contains the current date. - the IPM FPO Payment Code field contains the EXC flexible payment option code. - the IPM Deposit Release Date contains the current date. - releases the credit invoice for netting, updating the IPM Deposit Release Date to the current date. - processes the refund. However, the system does not print or email the credit card credit acknowledgment for the refund until the next time you run process refunds. - updates the Pay Plan Code field for the credit card pay type on the Display Order Pay Type 2 screen with the EXC flexible payment option code. - creates the following Order Transaction History records that you can view on the Display Order History screen: <pre> REFUND CC Crd for inv# 1036 processed-deferred 100.00 your default user SHIPMENT Pick# 0004037 Billed on Invoice# 0001037 60.00 KBROWN </pre> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> B Inv# 1037 created for \$60.00 1037 KBROWN B with a deposit release date of 21915. 1037 KBROWN </pre>

#	Step
6	You process deposits. The system: • nets the credit invoice containing the return item with the debit invoice containing the exchange item. In this example, the net difference is a 40.00 credit. The system processes the credit invoice for 40.00. – For the credit invoice that contains the returned item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to -60.00 and updates the Deposit To Date field to -40.00. – For the debit invoice that contains the exchange item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to 60.00. The Deposit To Date field remains blank since no amount was deposited for the debit invoice. • updates the refund amount to 40.00 to reflect the actual amount refunded to the customer's credit card. You can review the updated amount on the Display Refunds for Order Screen. • creates the following Order Transaction History record that you can view on the Display Order History screen: <pre> REFUND Refund amount netted to -40.00 KBROWN </pre> • creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> N Pend Dep of \$60.00 on INV1037 netted 1037 KBROWN N against CRD1036 reducing to \$40.00- . 1037 KBROWN N Pend Dep of \$60.00 on INV1037 netted 1036 KBROWN N against CRD1036 reducing to \$40.00- . 1036 KBROWN D Deposit confirmed \$ 40.00- 1036 KBROWN </pre>

CC Net Example: Uneven Exchange for Less Expensive Item Plus Ship Alone Item; Invoices Not Consolidated

The system performs the following steps during credit card net exchange processing when the exchange item is less expensive than the return item. In this example, the customer also orders an additional ship alone item for \$30.00. The Consolidated Invoice (B49) system control value is unselected.

#	Step
1.	The customer places an order for an item for \$100.00. The item is picked, shipped, and billed. The order is processed through deposits.
2.	The customer returns the item for \$100.00 to exchange it for a less expensive item (\$60.00). The customer also adds a ship alone item for \$30.00 to the order.

#	Step
3	When the return and exchange transaction is accepted and billed, the system - updates the ODT Seq # field in the RA Exchange Item table with the order detail sequence number of the exchange item added to the order. - creates a manual authorization for the return amount (\$100.00) using the authorization number defined in the Default Auth Code for CC Netting (M25) system control value. The expiration date for the manual authorization is based on the Reauthorization days defined for the credit card pay type. - creates a refund for \$100.00 in a held status and updates the Hold until date with the calculated hold days using the current date + the # of days for deferral defined for the EXC flexible payment option. - creates a credit invoice for the returned item for \$100.00. The system also updates the Invoice Payment Method record for the credit invoice: - the IPM FPO Payment Code field contains the EXC flexible payment option code. - the IPM Deposit Release Date is calculated using the current date + the # of days for deferral defined for the EXC flexible payment option. - creates the following Order Transaction History records that you can view on the Display Order History screen: <pre> RTN AUTH RA Credit pending processing 100.00 KBROWN MAINT Order was maintained 90.00 KBROWN AUTH MANUAL AUTH# DETECTED - CCNET 100.00 OEPICKAUTH SHIPMENT CREDIT BILLED ON INVOICE# 0001039. 100.00- KBROWN </pre> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> B Inv# 1039 created for \$100.00- 1039 KBROWN B with a deposit release date of 30115. 1039 KBROWN </pre>
4	You run pick slip generation for the exchange item (\$60.00) and ship alone item (\$30.00). The system generates a separate pick slip for each item.

#	Step
5	You ship and bill the exchange item and ship alone item. The system: - creates a debit invoice for \$60.00 for the exchange item. The system also updates the Invoice Payment Method record for the debit invoice: - the IPM Auth # contains the authorization code defined in the Default Auth Code for CC Netting (M25) system control value. - the IPM Auth Date contains the current date. - the IPM FPO Payment Code field contains the EXC flexible payment option code. - the IPM Deposit Release Date contains the current date. - creates a debit invoice for \$30.00 for the ship alone item. The system also updates the Invoice Payment Method record for the debit invoice: - the IPM Auth # contains the authorization code defined in the Default Auth Code for CC Netting (M25)v system control value. - the IPM Auth Date contains the current date. - the IPM FPO Payment Code field contains the EXC flexible payment option code. - the IPM Deposit Release Date contains the current date. - releases the credit invoice for netting, updating the IPM Deposit Release Date to the current date. - processes the refund. However, the system does not print or email the credit card credit acknowledgment for the refund until the next time you run process refunds. - updates the Pay Plan Code field for the credit card pay type on the Display Order Pay Type 2 screen with the EXC flexible payment option code. - creates the following Order Transaction History records that you can view on the Display Order History screen: <pre> REFUND CC Crd for inv# 1039 processed-deferred 100.00 your default user SHIPMENT Pick# 0004039 Billed on Invoice# 0001040 60.00 KBROWN SHIPMENT Pick# 0004040 Billed on Invoice# 0001041 30.00 KBROWN </pre> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> B Inv# 1040 created for \$60.00 1040 KBROWN B with a deposit release date of 21915 1040 KBROWN B Inv# 1041 created for \$30.00 1041 KBROWN B with a deposit release date of 21915 1041 KBROWN </pre>

#	Step
6	You process deposits. The system: • nets the credit invoice containing the return item with the debit invoices containing the exchange item and ship alone item. In this example, the net difference is a 10.00 credit (100.00 credit invoice - 60.00 debit invoice - 30.00 debit invoice = 10.00 credit). The system processes the credit invoice for 10.00. – For the credit invoice that contains the returned item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to -90.00 and updates the Deposit To Date field to -10.00. – For the debit invoice that contains the exchange item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to 60.00. The Deposit To Date field remains blank since no amount was deposited for the debit invoice. – For the debit invoice that contains the ship alone item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to 30.00. The Deposit To Date field remains blank since no amount was deposited for the debit invoice. • updates the refund amount to 10.00 to reflect the actual amount refunded to the customer's credit card. You can review the updated amount on the Display Refunds for Order Screen. • creates the following Order Transaction History record that you can view on the Display Order History screen: <pre> REFUND Refund amount netted to -40.00 KBROWN </pre> • creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> N Pend Dep of \$60.00 on INV1040 netted 1040 KBROWN N against CRD1039 reducing to \$40.00-. 1040 KBROWN N Pend Dep of \$60.00 on INV1040 netted 1039 KBROWN N against CRD1039 reducing to \$40.00-. 1039 KBROWN N Pend Dep of \$30.00 on INV1041 netted 1041 KBROWN N against CRD1039 reducing to \$10.00-. 1041 KBROWN N Pend Dep of \$30.00 on INV1041 netted 1039 KBROWN N against CRD1039 reducing to \$10.00-. 1039 KBROWN D Deposit confirmed \$ 10.00- 1039 KBROWN </pre>

CC Net Example: Uneven Exchange for Less Expensive Item Plus Ship Alone Item; Invoices Consolidated

The system performs the following steps during credit card net exchange processing when the exchange item is less expensive than the return item. In this example, the customer also

orders an additional ship alone item for \$30.00. The Consolidated Invoice (B49) system control value is selected.

! Important:

In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date.

#	Step																																				
1.	The customer places an order for an item for \$100.00. The item is picked, shipped, and billed. The order is processed through deposits.																																				
2.	The customer returns the item for \$100.00 to exchange it for a less expensive item (\$60.00). The customer also adds a ship alone item for \$30.00 to the order.																																				
3	When the return and exchange transaction is accepted and billed, the system - updates the ODT Seq # field in the RA Exchange Item table with the order detail sequence number of the exchange item added to the order. - creates a manual authorization for the return amount (\$100.00) using the authorization number defined in the Default Auth Code for CC Netting (M25) system control value. The expiration date for the manual authorization is based on the Reauthorization days defined for the credit card pay type. - creates a refund for \$100.00 in a held status and updates the Hold until date with the calculated hold days using the current date + the # of days for deferral defined for the EXC flexible payment option. - creates a credit invoice for the returned item for \$100.00. The system also updates the Invoice Payment Method record for the credit invoice: - the IPM FPO Payment Code field contains the EXC flexible payment option code. - the IPM Deposit Release Date is calculated using the current date + the # of days for deferral defined for the EXC flexible payment option. - creates the following Order Transaction History records that you can view on the Display Order History screen: <table><tr><td>RTN AUTH</td><td>RA Credit pending processing</td><td>100.00</td></tr><tr><td>KBROWN</td><td></td><td></td></tr><tr><td>MAINT</td><td>Order was maintained</td><td>90.00</td></tr><tr><td>KBROWN</td><td></td><td></td></tr><tr><td>AUTH</td><td>MANUAL AUTH# DETECTED - CCNET</td><td>100.00</td></tr><tr><td>OEPICKAUTH</td><td></td><td></td></tr><tr><td>SHIPMENT</td><td>CREDIT BILLED ON INVOICE# 0001043</td><td>100.00-</td></tr><tr><td>KBROWN</td><td></td><td></td></tr></table> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <table><tr><td>B</td><td>Inv# 1043 created for \$100.00-</td><td>1043</td></tr><tr><td>KBROWN</td><td></td><td></td></tr><tr><td>B</td><td>with a deposit release date of 30115</td><td>1043</td></tr><tr><td>KBROWN</td><td></td><td></td></tr></table>	RTN AUTH	RA Credit pending processing	100.00	KBROWN			MAINT	Order was maintained	90.00	KBROWN			AUTH	MANUAL AUTH# DETECTED - CCNET	100.00	OEPICKAUTH			SHIPMENT	CREDIT BILLED ON INVOICE# 0001043	100.00-	KBROWN			B	Inv# 1043 created for \$100.00-	1043	KBROWN			B	with a deposit release date of 30115	1043	KBROWN		
RTN AUTH	RA Credit pending processing	100.00																																			
KBROWN																																					
MAINT	Order was maintained	90.00																																			
KBROWN																																					
AUTH	MANUAL AUTH# DETECTED - CCNET	100.00																																			
OEPICKAUTH																																					
SHIPMENT	CREDIT BILLED ON INVOICE# 0001043	100.00-																																			
KBROWN																																					
B	Inv# 1043 created for \$100.00-	1043																																			
KBROWN																																					
B	with a deposit release date of 30115	1043																																			
KBROWN																																					
4	You run pick slip generation for the exchange item (\$60.00) and ship alone item (\$30.00). The system generates a separate pick slip for each item.																																				

#	Step
5	You ship and bill the exchange item and ship alone item. The system: - creates a debit invoice for \$90.00 for the exchange item and ship alone item (60.00 exchange item + 30.00 ship alone item). The system also updates the Invoice Payment Method record for the debit invoice: - the IPM Auth # contains the authorization code defined in the Default Auth Code for CC Netting (M25) system control value. - the IPM Auth Date contains the current date. - the IPM FPO Payment Code field contains the EXC flexible payment option code. - the IPM Deposit Release Date contains the current date. - releases the credit invoice for netting, updating the IPM Deposit Release Date to the current date. - processes the refund. However, the system does not print or email the credit card credit acknowledgment for the refund until the next time you run process refunds. - updates the Pay Plan Code field for the credit card pay type on the Display Order Pay Type 2 screen with the EXC Net Billing for Exchanges flexible payment option code. - creates the following Order Transaction History records that you can view on the Display Order History screen: <pre> REFUND CC Crd for inv# 1043 processed-deferred 100.00 your default user SHIPMENT Pick# 0004042 Billed on Invoice# 0001044 60.00 KBROWN SHIPMENT Pick# 0004043 Billed on Invoice# 0001044 30.00 KBROWN </pre> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> B Inv# 1044 created for \$60.00 1044 KBROWN B with a deposit release date of 21915 1044 KBROWN B Inv# 1044 created for \$60.00 1044 KBROWN B with a deposit release date of 21915 1044 KBROWN </pre>

#	Step
6	You process deposits. The system: • nets the credit invoice containing the return item with the debit invoice containing the exchange item and ship alone item. In this example, the net difference is a 10.00 credit (100.00 credit invoice - 90.00 debit invoice = 10.00 credit). The system processes the credit invoice for 10.00. – For the credit invoice that contains the returned item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to -90.00 and updates the Deposit To Date field to -10.00. – For the debit invoice that contains the exchange item and ship alone item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to 90.00. The Deposit To Date field remains blank since no amount was deposited for the debit invoice. • updates the refund amount to 10.00 to reflect the actual amount refunded to the customer's credit card. You can review the updated amount on the Display Refunds for Order Screen. • creates the following Order Transaction History record that you can view on the Display Order History screen: <pre> REFUND Refund amount netted to -10.00 KBROWN </pre> • creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> N Pend Dep of \$90.00 on INV1044 netted 1044 KBROWN N against CRD1043 reducing to \$10.00- . 1044 KBROWN N Pend Dep of \$90.00 on INV1044 netted 1043 KBROWN N against CRD1043 reducing to \$10.00- . 1043 KBROWN D Deposit confirmed \$ 10.00- 1043 KBROWN </pre>

CC Net Example: Uneven Exchange for More Expensive Item

The system performs the following steps during credit card net exchange processing when the exchange item is more expensive than the return item. In this example, no other items besides the exchange item are added to the order.

#	Step
1.	The customer places an order for an item for \$100.00. The item is picked, shipped, and billed. The order is processed through deposits.
2.	The customer returns the item for \$100.00 to exchange it for a more expensive item (\$140.00).

#	Step
3	When the return and exchange transaction is accepted and billed, the system - updates the ODT Seq # field in the RA Exchange Item table with the order detail sequence number of the exchange item added to the order. - creates a manual authorization for the return amount (\$100.00) using the authorization number defined in the Default Auth Code for CC Netting (M25) system control value. The expiration date for the manual authorization is based on the Reauthorization days defined for the credit card pay type. - creates a refund for \$100.00 in a held status and updates the Hold until date with the calculated hold days using the current date + the # of days for deferral defined for the EXC flexible payment option. - creates a credit invoice for the returned item for \$100.00. The system also updates the Invoice Payment Method record for the credit invoice: - the IPM FPO Payment Code field contains the EXC flexible payment option code. - the IPM Deposit Release Date is calculated using the current date + the # of days for deferral defined for the EXC flexible payment option. - creates the following Order Transaction History records that you can view on the Display Order History screen: <pre> RTN AUTH RA Credit pending processing 100.00 KBROWN MAINT Order was maintained 140.00 KBROWN SHIPMENT CREDIT BILLED ON INVOICE# 0001046. 100.00- KBROWN </pre> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> B Inv# 1046 created for \$100.00- 1046 KBROWN B with a deposit release date of 30515. 1046 KBROWN </pre>
4	You run pick slip generation for the exchange item. During pick slip generation, the system: - creates a manual authorization for the return amount (\$100.00) using the authorization number defined in the Default Auth Code for CC Netting (M25) system control value. The expiration date for the manual authorization is based on the Reauthorization days defined for the credit card pay type. - performs batch authorization for the exchange amount that is not covered by the authorized amount already on the order. In this example, the system performs batch authorization for \$40.00 since the order already was authorized for \$100.00 for the item that was returned. - creates the following Order Transaction History records that you can view on the Display Order History screen: <pre> AUTH MANUAL AUTH# DETECTED - CCNET 100.00 AUTH </pre>

#	Step
5	You ship and bill the exchange item and ship alone item. The system: - creates a debit invoice for \$90.00 for the exchange item and ship alone item (60.00 exchange item + 30.00 ship alone item). The system also updates the Invoice Payment Method record for the debit invoice: - the IPM Auth # contains the authorization code defined in the Default Auth Code for CC Netting (M25) system control value. - the IPM Auth Date contains the current date. - the IPM FPO Payment Code field contains the EXC flexible payment option code. - the IPM Deposit Release Date contains the current date. - releases the credit invoice for netting, updating the IPM Deposit Release Date to the current date. - processes the refund. However, the system does not print or email the credit card credit acknowledgment for the refund until the next time you run process refunds. - updates the Pay Plan Code field for the credit card pay type on the Display Order Pay Type 2 screen with the EXC Net Billing for Exchanges flexible payment option code. - creates the following Order Transaction History records that you can view on the Display Order History screen: <pre> REFUND CC Crd for inv# 1046 processed-deferred 100.00 your default user SHIPMENT Pick# 0004045 Billed on Invoice# 0001047 140.00 KBROWN </pre> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> B Inv# 1047 created for \$140.00 1047 KBROWN B with a deposit release date of 22315. 1018 KBROWN </pre>

#	Step
6	You process deposits. The system: • nets the credit invoice containing the return item with the debit invoice containing the exchange item. In this example, the net difference is 40.00. The system processes the debit invoice for 40.00. – For the credit invoice that contains the returned item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to -100.00 and leaves the Deposit To Date field blank since no amount was deposited for the credit invoice. – For the debit invoice that contains the exchange item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to 100.00 and updates the Deposit To Date field to 40.00. • creates the following Order Transaction History record that you can view on the Display Order History screen: <pre> REFUND Refund amount netted to 0.00 KBROWN </pre> • creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> N Pend Dep of \$100.00 on CRD1046 netted 1046 KBROWN N against INV1047 reducing to \$40.00 . 1046 KBROWN N Pend Dep of \$100.00 on CRD1046 netted 1047 KBROWN N against INV1047 reducing to \$40.00 . 1047 KBROWN D Deposit confirmed \$ 40.00- 1047 KBROWN </pre>

CC Net Example: Uneven Exchange for More Expensive Item Plus Ship Alone Item, Invoices Not Consolidated

The system performs the following steps during credit card net exchange processing when the exchange item is more expensive than the return item. In this example, the customer also orders an additional ship alone item for \$30.00. The Consolidated Invoice (B49) system control value is unselected.

#	Step
1.	The customer places an order for an item for \$100.00. The item is picked, shipped, and billed. The order is processed through deposits.
2.	The customer returns the item for \$100.00 to exchange it for a more expensive item (\$140.00) and also adds a ship alone item for \$30.00.

#	Step																														
3	When the return and exchange transaction is accepted and billed, the system - updates the ODT Seq # field in the RA Exchange Item table with the order detail sequence number of the exchange item added to the order. - creates a manual authorization for the return amount (\$100.00) using the authorization number defined in the Default Auth Code for CC Netting (M25) system control value. The expiration date for the manual authorization is based on the Reauthorization days defined for the credit card pay type. - creates a refund for \$100.00 in a held status and updates the Hold until date with the calculated hold days using the current date + the # of days for deferral defined for the EXC flexible payment option. - creates a credit invoice for the returned item for \$100.00. The system also updates the Invoice Payment Method record for the credit invoice: - the IPM FPO Payment Code field contains the EXC flexible payment option code. - the IPM Deposit Release Date is calculated using the current date + the # of days for deferral defined for the EXC flexible payment option. - creates the following Order Transaction History records that you can view on the Display Order History screen: <table border="1"> <tbody> <tr> <td>RTN AUTH</td> <td>RA Credit pending processing</td> <td>100.00</td> </tr> <tr> <td colspan="3">KBROWN</td> </tr> <tr> <td>MAINT</td> <td>Order was maintained</td> <td>170.00</td> </tr> <tr> <td colspan="3">KBROWN</td> </tr> <tr> <td>SHIPMENT</td> <td>CREDIT BILLED ON INVOICE# 0001049</td> <td>100.00-</td> </tr> <tr> <td colspan="3">KBROWN</td> </tr> </tbody> </table> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <table border="1"> <tbody> <tr> <td>B</td> <td>Inv# 1046 created for \$100.00-</td> <td>1046</td> </tr> <tr> <td colspan="3">KBROWN</td> </tr> <tr> <td>B</td> <td>with a deposit release date of 30515.</td> <td>1046</td> </tr> <tr> <td colspan="3">KBROWN</td> </tr> </tbody> </table>	RTN AUTH	RA Credit pending processing	100.00	KBROWN			MAINT	Order was maintained	170.00	KBROWN			SHIPMENT	CREDIT BILLED ON INVOICE# 0001049	100.00-	KBROWN			B	Inv# 1046 created for \$100.00-	1046	KBROWN			B	with a deposit release date of 30515.	1046	KBROWN		
RTN AUTH	RA Credit pending processing	100.00																													
KBROWN																															
MAINT	Order was maintained	170.00																													
KBROWN																															
SHIPMENT	CREDIT BILLED ON INVOICE# 0001049	100.00-																													
KBROWN																															
B	Inv# 1046 created for \$100.00-	1046																													
KBROWN																															
B	with a deposit release date of 30515.	1046																													
KBROWN																															
4	You run pick slip generation for the exchange item. During pick slip generation, the system: - creates a manual authorization for the return amount (\$100.00) using the authorization number defined in the Default Auth Code for CC Netting (M25) system control value. The expiration date for the manual authorization is based on the Reauthorization days defined for the credit card pay type. - performs batch authorization for the amount that is not covered by the manual authorization amount already on the order. In this example, the system processes a separate batch authorization for \$40.00 for the exchange item and \$30.00 for the ship alone item. - creates the following Order Transaction History records that you can view on the Display Order History screen: <table border="1"> <tbody> <tr> <td>AUTH MANUAL AUTH#</td> <td>DETECTED - CCNET 100.00 AUTH</td> </tr> </tbody> </table>	AUTH MANUAL AUTH#	DETECTED - CCNET 100.00 AUTH																												
AUTH MANUAL AUTH#	DETECTED - CCNET 100.00 AUTH																														

#	Step
5	You ship and bill the exchange item and ship alone item. The system: - creates a debit invoice for \$140.00 for the exchange item. The system also updates the Invoice Payment Method record for the debit invoice: - the IPM Auth # contains the authorization code defined in the Default Auth Code for CC Netting (M25) system control value. - the IPM Auth Date contains the current date. - the IPM FPO Payment Code field contains the EXC flexible payment option code. - the IPM Deposit Release Date contains the current date. - creates a debit invoice for \$30.00 for the ship alone item. The system also updates the Invoice Payment Method record for the debit invoice: - the IPM Auth # contains the authorization code defined in the Default Auth Code for CC Netting (M25) system control value. - the IPM Auth Date contains the current date. - the IPM FPO Payment Code field contains the EXC flexible payment option code. - the IPM Deposit Release Date contains the current date. - releases the credit invoice for netting, updating the IPM Deposit Release Date to the current date. - processes the refund. However, the system does not print or email the credit card credit acknowledgment for the refund until the next time you run process refunds. - updates the Pay Plan Code field for the credit card pay type on the Display Order Pay Type 2 screen with the EXC Net Billing for Exchanges flexible payment option code. - creates the following Order Transaction History records that you can view on the Display Order History screen: <pre> REFUND CC Crd for inv# 1049 processed-deferred 100.00 your default user SHIPMENT Pick# 0004047 Billed on Invoice# 0001050 140.00 KBROWN SHIPMENT Pick# 0004048 Billed on Invoice# 0001051 30.00 KBROWN </pre> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> B Inv# 1050 created for \$140.00 1050 KBROWN B with a deposit release date of 22315. 1050 KBROWN B Inv# 1051 created for \$30.00 1051 KBROWN B with a deposit release date of 22315. 1051 KBROWN </pre>

#	Step
6	You process deposits. The system: • nets the credit invoice containing the return item with the debit invoices containing the exchange item and ship alone item. In this example, the net difference is 40.00 (100.00 credit for return item- 140.00 debit for exchange item + 30.00 debit for ship alone item). The system processes the debit invoice for 30.00. – For the credit invoice that contains the returned item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to -100.00 and leaves the Deposit To Date field blank since no amount was deposited for the credit invoice. – For the debit invoice that contains the exchange item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to 140.00 and updates the Deposit To Date field to 40.00 – For the debit invoice that contains the ship alone item, the system leaves the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) blank and updates the Deposit To Date field to 30.00 • creates the following Order Transaction History record that you can view on the Display Order History screen: <pre> REFUND Refund amount netted to 0.00 KBROWN </pre> • creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> N Pend Dep of \$100.00 on CRD1049 netted 1049 KBROWN N against INV1050 reducing to \$40.00 . 1049 KBROWN N Pend Dep of \$100.00 on CRD1049 netted 1050 KBROWN N against INV1050 reducing to \$40.00 . 1050 KBROWN D Deposit confirmed \$ 40.00- 1051 KBROWN D Deposit confirmed \$ 30.00 1051 KBROWN </pre>

CC Net Example: Uneven Exchange for More Expensive Item Plus Ship Alone Item; Invoices Consolidated

The system performs the following steps during credit card net exchange processing when the exchange item is more expensive than the return item. In this example, the customer also orders an additional ship alone item for \$30.00. The Consolidated Invoice (B49) system control value is selected.

! Important:

In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date.

#	Step
1.	The customer places an order for an item for \$100.00. The item is picked, shipped, and billed. The order is processed through deposits.

#	Step
2.	The customer returns the item for \$100.00 to exchange it for a more expensive item (\$140.00) and also adds a ship alone item for \$30.00.
3	When the return and exchange transaction is accepted and billed, the system - updates the ODT Seq # field in the RA Exchange Item table with the order detail sequence number of the exchange item added to the order. - creates a manual authorization for the return amount (\$100.00) using the authorization number defined in the Default Auth Code for CC Netting (M25) system control value. The expiration date for the manual authorization is based on the Reauthorization days defined for the credit card pay type. - creates a credit invoice for the returned item for \$100.00. The system also updates Invoice Payment Method record for the credit invoice: the IPM FPO Payment Code field contains the EXC flexible payment option code and the IPM Deposit Release Date contains the calculated release date using the current date + the # of days for deferral defined for the EXC flexible payment option. - creates the following Order Transaction History records that you can view on the Display Order History screen: - creates the following Order Transaction History records that you can view on the Display Order History screen: <pre> RTN AUTH RA Credit pending processing 100.00 KBROWN MAINT Order was maintained 170.00 KBROWN SHIPMENT CREDIT BILLED ON INVOICE# 0001053. 100.00- KBROWN </pre> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> B Inv# 1053 created for \$100.00- 1053 KBROWN B with a deposit release date of 30615. 1053 KBROWN </pre>
4	You run pick slip generation for the exchange item. During pick slip generation, the system: - creates a manual authorization for the return amount (\$100.00) using the authorization number defined in the Default Auth Code for CC Netting (M25) system control value. The expiration date for the manual authorization is based on the Reauthorization days defined for the credit card pay type. - performs batch authorization for the amount that is not covered by the manual authorization amount already on the order. In this example, the system processes a separate batch authorization for \$40.00 for the exchange item and \$30.00 for the ship alone item. - creates the following Order Transaction History records that you can view on the Display Order History screen: <pre> AUTH MANUAL AUTH# DETECTED - CCNET 100.00 AUTH </pre>

#	Step
5	You ship and bill the exchange item and ship alone item. The system: - creates a debit invoice for \$170.00 for the exchange item and ship alone item. The system also updates the Invoice Payment Method record for the debit invoice - the IPM Auth # contains the authorization code defined in the Default Auth Code for CC Netting (M25) system control value. - the IPM Auth Date contains the current date. - the IPM FPO Payment Code field contains the EXC flexible payment option code. - the IPM Deposit Release Date contains the current date. - releases the credit invoice for netting, updating the IPM Deposit Release Date to the current date. - processes the refund for 100.00. However, the system does not print or email the credit card credit acknowledgment for the refund until the next time you run process refunds. - updates the Pay Plan Code field for the credit card pay type on the Display Order Pay Type 2 screen with the EXC flexible payment option code. - creates the following Order Transaction History records that you can view on the Display Order History screen:<pre>REFUND CC Crd for inv# 1053 processed-deferred 100.00 your default user SHIPMENT Pick# 0004051 Billed on Invoice# 0001054 140.00 KBROWN SHIPMENT Pick# 0004052 Billed on Invoice# 0001054 30.00 KBROWN</pre> - creates the following Order Payment History records that you can view on the Display Order Payment History Screen:<pre>B Inv# 1054 created for \$140.00 1054 KBROWN B with a deposit release date of 22415. 1054 KBROWN B Inv# 1054 created for \$170.00 1054 KBROWN B with a deposit release date of 22415. 1054 KBROWN</pre>

#	Step
6	You process deposits. The system: • nets the credit invoice containing the return item with the debit invoice containing the exchange item and ship alone item. In this example, the net difference is 70.00 (100.00 credit for return item- 170.00 debit for exchange item and ship alone item). The system processes the debit invoice for 70.00.. – For the credit invoice that contains the returned item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to -100.00 and leaves the Deposit To Date field blank since no amount was deposited for the credit invoice. – For the debit invoice that contains the exchange item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to 140.00 and updates the Deposit To Date field to 40.00 – For the debit invoice that contains the exchange item and ship alone item, the system updates the Adjusted Amt on the Display Invoice Payment Method Screen (Reviewing Detail) to 70.00 and updates the Deposit To Date field to 70.00. • creates the following Order Transaction History record that you can view on the Display Order History screen: <pre> REFUND Refund amount netted to 0.00 KBROWN </pre> • creates the following Order Payment History records that you can view on the Display Order Payment History Screen: <pre> N Pend Dep of \$100.00 on CRD1053 netted 1053 KBROWN N against INV1054 reducing to \$70.00 . 1053 KBROWN N Pend Dep of \$100.00 on CRD1053 netted 1054 KBROWN N against INV1054 reducing to \$70.00 . 1054 KBROWN D Deposit confirmed \$ 70.00 1054 KBROWN </pre>

Processing Deposits

Topics in this part:

- [Processing Auto Deposits \(SDEP\)](#) describes the Submit Auto Deposits menu option.
- [Manage Rejected Deposits](#) in Modern View describes how to review and work with rejected or unconfirmed deposits.
- [Printing the Deposit History Summary \(PDHS\)](#) describes how to print a report summarizing credit card deposits by date.
- [Printing the Credit Card Deposit Schedule \(PCCD\)](#) describes how to print a report listing the your projected deposits for deferred or installment billing pay plans.
- [Printing the Pending Payment Plan Deposits Report \(PPPD\)](#) describes how to print a report listing future deferred or installment deposits by order and invoice number.
- [Printing the Deposit History Detail Report \(PDHD\)](#) describes how to print a report listing deposits processed during a specific date range. Within this date range, you can select to include only deposits for a specific authorization service, pay type, and status.

E-Commerce Interface

Topics in this part:

- *E-Commerce Catalog Requests* describes how the system processes a catalog request received from the web storefront.
- *E-Commerce Item Availability Processing* describes how the system extracts item availability information for download to the web storefront.

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

- [Working with Batch Order Maintenance Transactions \(WBOM\)](#) describes how the system processes a cancellation request from the web storefront and how to work with order cancel request errors.
- [E-Commerce Setup](#) describes the setup required in Order Administration for the e-commerce interface, and specifies additional documentation detailing setup requirements for communicating and for the web storefront.
- [Downloading E-Commerce Offer Files \(EOFR\)](#) describes the process you use to extract information related to items, source codes and offers to staging files for subsequent download to the web storefront.
- [Working with E-Mail Notification Templates \(WEMT\)](#) describes how to set up templates for the various email notifications you can send to customers.
- [Sending Internet Order Ship Confirmation \(ESCF\)](#) describes the menu option you use to send email confirmations for shipment of orders received through the web storefront.

Workflow Management

Topics in this part: The following topics describe the functions available for workflow management.

- [Workflow Management Overview and Setup](#) provides an overview on workflow management and required setup.
- [Working with Tickler User Groups \(WTUG\)](#) explains how to create and work with tickler user groups.
- [Working with Tickler Category \(WTCT\)](#) explains how to create and work with tickler categories.
- [Working with Tickler Resolution Reasons \(WTRR\)](#) explains how to create and work with tickler resolution reasons.
- [Working with Tickler Events \(WTEV\)](#) explains how to define tickler event settings at the event level and event rule level and create, change, delete, and define procedures for event rules.
- [Working with Tickler Users/User Groups \(WTIC\)](#) allows workflow users to review and work with ticklers in the user's or user group's tickler work queue.
- [Workflow Management \(WWFM\)](#) allows workflow supervisors to review and work with ticklers in a tickler work queue.
- [Purging Ticklers \(MPTK\)](#) allows you to purge resolved ticklers by date range.

Workflow Management Overview and Setup

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

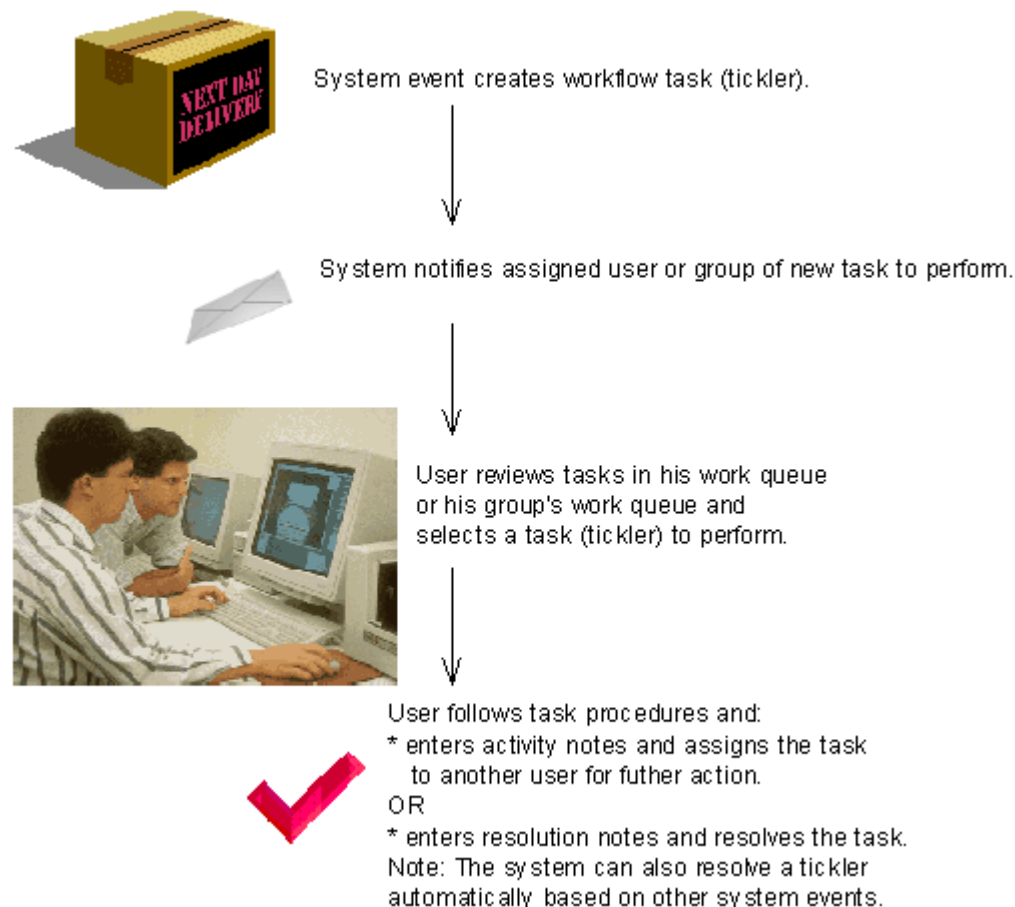
Tickler events are the system actions for which the system may create a workflow task (tickler).

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

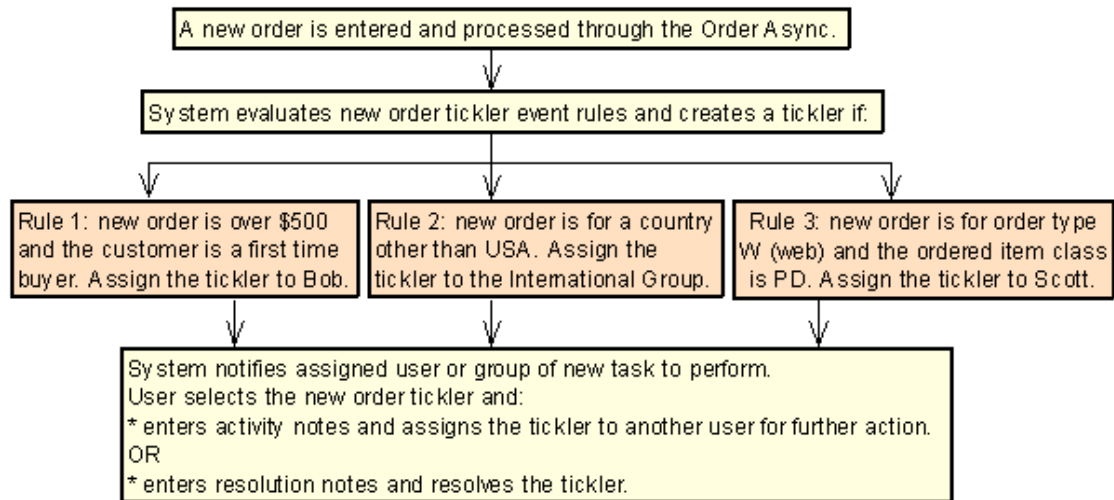
Ticklers are tasks automatically created by the system and assigned to a user when a system action meets the criteria defined for a tickler event rule. For each tickler, you can define the procedures, or instructions, the user should follow to complete the task. A tickler can also be created manually.

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

Workflow Management Illustration



Example: This flowchart provides an example of the workflow process.



With workflow management:

- the system automatically creates ticklers when a task must be performed and resolved.
- the system assigns tasks to a specific user or group of users as soon as a tickler is created ensuring the tasks are not misplaced, stalled, or duplicated. Tickler assignment allows only authorized users access to the tickler and the associated data.
- supervisors are notified if a tickler remains unresolved for a specified number of days to ensure the tasks are resolved in a timely manner. Supervisors can reassign ticklers to the appropriate resource.
- the procedures to resolve a task are formally documented to ensure users are following the instructions exactly and reducing the cost of training staff.
- the most important ticklers are worked on first by a specified priority so users don't waste time choosing which tickler to work on or putting off difficult tasks.
- a history of the activity performed against the tickler is stored for easy tracking and review of what was done and when.

In this topic:

- [System Delivered Tickler Events](#)
 - [Defining Tickler Events and Event Rules](#)
- [Creating Ticklers](#)
 - [Why Wasn't a Tickler Created?](#)
- [Working with Ticklers](#)
 - [Update All Ticklers Secured Feature](#)
 - [User Workflow Management Window](#)
 - [Customer Workflow Management Window](#)
 - [Tickler Merge/Purge](#)
 - [Resolving Ticklers](#)
- [Workflow Management Setup](#)
 - [System Control Value](#)
 - [Secured Feature](#)
 - [Number Assignment Value](#)

- [Menu Options](#)
- [Periodic Functions](#)

System Delivered Tickler Events

This table describes the 11 system delivered events that can create ticklers, based on the system action and the criteria defined for the event rules. You use the [Working with Tickler Events \(WTEV\)](#) menu option to set up each tickler event and define criteria for each event rule.

**Note:**

Each tickler event is delivered as inactive.

Tickler Event...	creates a tickler when the system...	and one or more of the following criteria is met...
BO backorders	places an item on backorder	An item is backordered, regardless of any other criteria. The backordered item is initially backordered in order entry/maintenance and not by some other program. The customer's life-to-date order dollars is less than, equal to, or greater than a specified life-to-date order dollars. The customer class defined for the sold to customer matches a specified customer class. The item/SKU on backorder matches a specified item/SKU. The item status of the backordered item matches a specified item status. The item class of the backordered item matches a specified item class. The ship via on the backordered order matches a specified ship via. The ship via priority for the ship via on the backordered order matches a specified ship via priority. See BO (Backorders) Event Processing.
CO cancelled orders	cancels an item	An item is cancelled, regardless of any other criteria. The item is cancelled by a batch process instead of interactively. The customer's life-to-date order dollars is less than, equal to, or greater than a specified life-to-date order dollars. The customer class defined for the sold to customer matches a specified customer class. The cancelled item/SKU matches a specified item/SKU. The item status of the cancelled item matches a specified item status.

Tickler Event...	creates a tickler when the system...	and one or more of the following criteria is met...
		The item class of the cancelled item matches a specified item class. The cancel reason matches a specified cancel reason. The ship via on the cancelled order matches a specified ship via. The ship via priority for the ship via on the cancelled order matches a specified ship via priority. See CO (Cancelled Orders) Event Processing.
HO held orders	places an order, order recipient, or order payment method on hold	The hold reason (order or pay type) matches a specified hold reason (order or pay type). The pay type on the held order matches a specified pay type. The order total for the held order is less than, equal to, or greater than a specified order total. The ship via on the held order matches a specified ship via. The ship via priority for the ship via on the held order matches a specified ship via priority. See HO (Held Orders) Event Processing.
MN manually created	manually creates a workflow task	You cannot define criteria for this tickler event. See MN (Manually Created) Event Processing.
NO new orders	updates the status of an order line to open (during order accept) or closed (during the Billing Async)	The order line status is updated to open or closed. The quantity ordered/shipped for the open/closed order line matches a specified quantity. The item status for the item on the open/closed order line matches a specified item status. The sold to customer on the order is a first time buyer. The item class for the item on the open/closed order line matches a specified item class. The item/SKU on the open/closed order line matches a specified item/SKU. The order type for the order matches a specified order type.

Tickler Event...	creates a tickler when the system...	and one or more of the following criteria is met...
		The country code for the order matches a specified country code. The country code for the order is a country other than the Default Country for Customer Address (B17) system control value. The last order date for the sold to customer is past the current date by a specified number of days. The order total on the order is less than, equal to, or greater than a specified order dollars. The ship via code on the order line or order header matches the ship via code on the event rule. The priority for the ship via code on the order line or order header matches the ship via priority on the event rule. See NO (New Orders) Event Processing.
OO aged open orders	evaluates aged open orders using the Evaluate Create/Resolve Ticklers periodic function (program name PFR0072)	The order's entered date or arrival date is older than the current date by a specified number of days. The ship via on the order matches a specified ship via. The ship via priority for the ship via on the order matches a specified ship via priority. See OO (Aged Open Orders) Event Processing.
SD stored value card activation decline	receives a declined stored value card activation response from the service bureau	You cannot define criteria for this tickler event. See SD (SVC Activation Decline) Event Processing.
SO soldout orders	sells out an item	The order line is soldout by a batch process and not interactively. The order line is sold out interactively in order entry or order maintenance. The life-to-date order dollars for the sold to customer is less than, equal to, or greater than a specified life-to-date order dollars. The customer class for the sold to customer matches a specified customer class. The soldout item/SKU matches a specified item/SKU. The item status for the soldout item matches a specified item status. The item class for the soldout item matches a specified item class. The ship via on the soldout order matches a specified ship via. The ship via priority for the ship via on the soldout order matches a specified ship via priority. See SO (Soldout Orders) Event Processing.

Tickler Event...	creates a tickler when the system...	and one or more of the following criteria is met...
SV stored value card number assignment	processes an order containing a stored value card item without a number assignment through the Billing Async	You cannot define criteria for this tickler event. See SV (SVC Number Assignment) Event Processing .
UP unconfirmed pick tickets	evaluates unconfirmed pick slips using the Evaluate Create/Resolve Ticklers periodic function (program name PFR0072)	The pick control date for the unconfirmed pick slip is older than the system date by a specified number of days. The pick category for the unconfirmed pick slip matches a specified pick category. The ship via on the unconfirmed pick slip matches a specified ship via. The ship via priority for the ship via on the unconfirmed pick slip matches a specified ship via priority. See UP (Unconfirmed Pick Tickets) Event Processing .
VP voided pick tickets	voids a pick slip	The ship via on the voided pick slip matches a specified ship via. The ship via priority for the ship via on the voided pick slip matches a specified ship via priority. The item/SKU on the voided pick slip matches a specified item/SKU. See VP (Voided Pick Tickets) Event Processing .
WF remote workflow	receives a CWWorkflow XML message from an external system	The source value in the CWWorkflow XML message matches the value in the Source field for the event rule. See WF (Remote Workflow) Event Processing .

Defining Tickler Events and Event Rules

To create a tickler, you must define:

- the tickler events that can create a tickler; see [System Delivered Tickler Events](#).
- tickler event settings, that define how the system creates ticklers for each event; see [Tickler Event Settings](#).
- event rule settings, that override the settings defined at the event level and determine how the event rule is processed; see [Event Rule Settings](#).
- event rule criteria, that define the criteria the system action must meet to create a tickler; see [Event Rule Criteria](#).
- event rule procedures, that define the instructions a user should follow to work with and resolve a tickler created by the event rule.

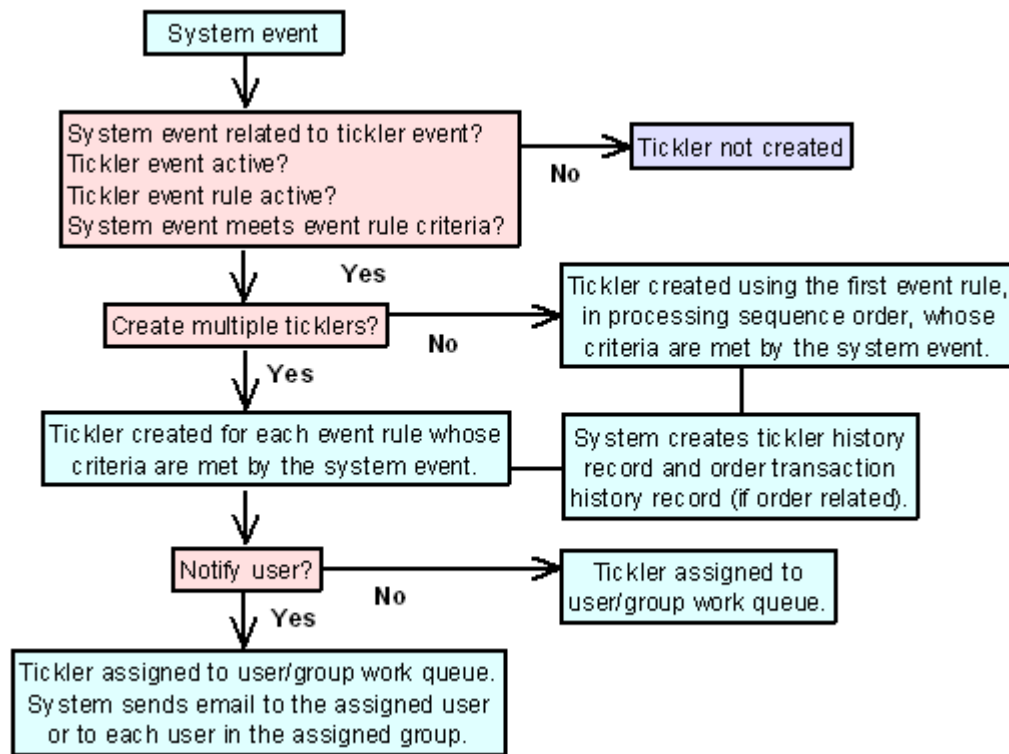
You use the Working with Tickler Events (WTEV) menu option to set up the system delivered tickler events and define event rules.

Creating Ticklers

The Create Tickler program determines if the system creates a tickler during certain system actions.

You can also manually create a tickler for the MN (manually created) tickler event; see [MN \(Manually Created\) Event Processing](#).

Tickler creation logic: This flowchart describes the process the system uses to determine if a tickler is created for a system action.



The Create Tickler program:

1. Determines the tickler event to evaluate, based on the system action currently being performed.

See [System Delivered Tickler Events](#) for more information on when the system evaluates tickler events.

2. Determines if the tickler event is active.

In order to create a tickler for a tickler event, the Active field defined for the event must be selected.

- If the Active field for the event is selected, the tickler event is active and the system can create a tickler for the event.
- If the Active field for the event is unselected, the tickler event is not active and the system cannot create a tickler for the event.

See [Active Tickler Events and Rules](#).

3. Determines if any event rules for the tickler event are active.

In order to create a tickler for an event rule, the Active field defined for the event rule must be selected.

- If the Active field for an event rule is selected, the event rule is active and the system can create a tickler if the system action meets the rule's criteria.
- If the Active field for an event rule is unselected, the event rule is not active and the system cannot create a tickler for the system action.

See [Active Tickler Events and Rules](#).

4. Determines if the system action meets the criteria required for any of the event rules to create a tickler.

In order to create a tickler for an event rule, the system action must meet the criteria defined for the event rule. If the system action does not meet the criteria, the system does not create a tickler.

- the system only evaluates event rules whose Active field is selected.
- the system evaluates the active event rules in processing sequence order, from lowest sequence number to highest. You define the processing sequence number for an event rule in the Processing sequence number field; see [Event Rule Processing Sequence](#).

5. Determines if more than one tickler can be created.

The Allow multiple ticklers field for the tickler event must be selected in order to create a tickler for each event rule whose criteria are met by the system action.

- If the Allow multiple ticklers field is unselected, the system creates one tickler for the first event rule, in processing sequence order, whose criteria are met by the system action. The AR, OO, and UP tickler events do not allow multiple ticklers.
- If the Allow multiple ticklers field is selected, the system creates a separate tickler for each event rule whose criteria are met by the system action.

See [Allowing Multiple Ticklers](#).

6. The system creates a tickler for the system action.

The system creates a tickler record in the Tickler table in an open status.

7. The system determines if the assigned to user or assigned to tickler group should be notified of the created tickler.

The Notify user/group field defined for the tickler event that created the tickler indicates whether the system sends an email notifying the user or tickler group of the created tickler.

- If the Notify user/group field is selected, the system sends an email to the assign to user or all users associated with the assign to tickler group. The system uses the email address defined for the user in the User Extended table. See [Tickler Notification](#) to review a sample email.
- If the Notify user/group field is unselected, the system does not send an email. The user must review the ticklers assigned to him or his user group at the [Work with Tickler Screen \(user/group view\)](#).

Regardless if the user is notified by email of the newly created tickler, the user can review the ticklers assigned to him and his tickler user group at the Work with Tickler screen; see [Working with Ticklers](#).

8. Creates a record in the Tickler History table.

The Tickler History table tracks the work cycle of a tickler; the system creates a tickler history record when a tickler is created, updated, or resolved. You can review tickler history at the [Display Tickler History Screen](#).

9. Creates a record in the Order Transaction History table if the tickler is associated with an order.

For MN ticklers:

```
MN TICKLER# 000009999 HAS BEEN CREATED
```

```
NOTE:SHORT NOTE DEFINED FOR TICKLER
```


For all other ticklers, where XX is the tickler event code:

```
XX TICKLER# 000009999 HAS BEEN CREATED
```

```
RULE:DESCRIPTION OF RULE ASSOCIATED WITH TICKLER
```

You can review order transaction history at the [Display Order History Screen](#).

For more information: For more information on the processing that occurs for each tickler event, see:

- [BO \(Backorders\) Event Processing](#)
- [CO \(Cancelled Orders\) Event Processing](#)
- [HO \(Held Orders\) Event Processing](#)
- [MN \(Manually Created\) Event Processing](#)
- [NO \(New Orders\) Event Processing](#)
- [OO \(Aged Open Orders\) Event Processing](#)
- [SD \(SVC Activation Decline\) Event Processing](#)
- [SO \(Soldout Orders\) Event Processing](#)
- [SV \(SVC Number Assignment\) Event Processing](#)
- [UP \(Unconfirmed Pick Tickets\) Event Processing](#)
- [VP \(Voided Pick Tickets\) Event Processing](#)
- [WF \(Remote Workflow\) Event Processing](#)

Why Wasn't a Tickler Created?

Use the list below as a checklist to determine why the system did not create a tickler.

A tickler is not created because...	Reason
You did not restart the background jobs after you changed an event or event rule, or created a new event rule.	The system evaluates new updates only after the background async jobs in the Background Job Control menu option are restarted.
The Active field for the tickler event is unselected.	The system only evaluates tickler events that are active. See Active Tickler Events and Rules .
The Active field for the event rule is unselected.	The system only evaluates event rules that are active. See Active Tickler Events and Rules .
The Allow multiple ticklers field for the tickler event is unselected.	If Allow multiple ticklers is selected, the system creates 1 tickler for the first event rule, in processing sequence order, whose criteria are met by the system action. If the criteria for another event rule is met, the system does not create a tickler. See Allowing Multiple Ticklers .
BO tickler event: the backordered item did not meet the BO event rule criteria.	See BO (Backorders) Event Processing .
CO tickler event: the cancelled item did not meet the CO event rule criteria.	See CO (Cancelled Orders) Event Processing .
HO tickler event: the held order did not meet the HO event rule criteria.	See HO (Held Orders) Event Processing .

A tickler is not created because...	Reason
NO tickler event: the open/closed order line did not meet the NO event rule criteria.	The system evaluates the NO event when an order: - is accepted (because the status of an order line updates from suspended to open), before creating a pre-generated pick. If a web order is placed in an error status in an order batch, the system evaluates the NO event when you edit and accept the order batch. Note: The system does not evaluate the NO event when you accept an order in order maintenance. - is processed through the Billing Async (because the status of an order line updates to closed). See NO (New Orders) Event Processing.
OO tickler event: the aged open order did not meet the OO event rule criteria.	See OO (Aged Open Orders) Event Processing .
SD tickler event: the stored value card received an approved activation response from the service bureau.	
SO tickler event: the soldout item did not meet the SO event rule criteria.	See SO (Soldout Orders) Event Processing .
SV tickler event: the stored value card item was assigned a number.	See SV (SVC Number Assignment) Event Processing .
UP tickler event: the unconfirmed pick slip did not meet the UP event rule criteria.	See UP (Unconfirmed Pick Tickets) Event Processing .
VP tickler event: the voided pick slip did not meet the VP event rule criteria.	See VP (Voided Pick Tickets) Event Processing .
WF tickler event: the remote workflow message did not meet the WF event rule criteria.	See WF (Remote Workflow) Event Processing .

Working with Ticklers

Once a tickler is created, a user can review, work with, and resolve ticklers using the following screens:

- Work with Tickler Screen (user/group view)
- [Workflow Management Screen](#) (tickler supervisor)
- [Work with Ticklers Screen](#) (sold to customer view)
- [Work with Ticklers Screen](#) (ship-to customer view)
- [Work with Ticklers Screen](#) (bill-to customer view)
- [Work with Ticklers Screen](#) (order view)

Update All Ticklers Secured Feature

The [Update All Ticklers \(B09\)](#) secured feature controls whether you can update all ticklers, regardless if the tickler is not assigned to you or your tickler groups.

If you have access to this feature, you can update any tickler, regardless if the tickler is not assigned to you or your tickler groups by:

- selecting Change for a tickler to change it.
- selecting Delete for a tickler to delete it.
- selecting In process for a tickler to assign the tickler to yourself.
- selecting Resolve for a tickler to resolve it.

If you do not have access to this feature, you can update only ticklers assigned to you or your tickler groups. However, you can still release an order associated with the tickler from hold.

User Workflow Management Window

Purpose: The system displays this window when you sign-in to Order Administration if open or in process ticklers exist that are assigned to you or your tickler groups.

You can review, work with, and resolve ticklers assigned to you or your tickler groups using the [Working with Tickler Users/User Groups \(WTIC\)](#) menu option

Customer Workflow Management Window

Purpose: The system displays this window if open or in process ticklers exist that are associated with the customer or order you are reviewing.

How to display this screen:

- select Change for a customer at the [Changing Sold To Customers](#) screens.
- select Change for a ship-to customer at the [Work with Customer Ship Tos Screen](#).
- select Change for a customer at the [Change Bill-to Customer Screen](#).
- advance to the [Order Inquiry Header Screen](#).
- select a customer for order entry at the [Select Customer Sold To For Order Screen](#).
- select a customer (CTI user) at the [Customer Selection Screen](#).
- select an order for return at the [Select Orders For Return Authorization Screen](#).

The window displays once per functional area for each customer you review that has open or in process ticklers.

Example: In standard order inquiry, if you select an order for a customer with open ticklers, the system displays the Customer Workflow Management window; if you then advance to order maintenance for that customer, the system does not display the window again. Back in standard order inquiry, if you select an order for a different customer with open ticklers, the system re-displays the Customer Workflow Management window for the new customer you are reviewing.

Screen Option	Procedure
Review and work with the ticklers associated with the customer or order	Select Ticklers to advance to the Work with Ticklers screen. The view of this screen varies, depending on the function you were performing: • sold to customers: Work with Ticklers Screen (sold to customer view) • ship to customers: Work with Ticklers Screen (ship-to customer view) • bill to customers: Work with Ticklers Screen (bill-to customer view) • orders: Work with Ticklers Screen (order view)

Tickler Merge/Purge

Customer merge/purge: If you perform customer merge/purge (sold to or bill to), the system adds the ticklers associated with the source customers to the target customer.

Order purge: If you purge orders associated with ticklers, the system also purges the ticklers.

Resolving Ticklers

A tickler is resolved when you:

- select Resolve for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or [Workflow Management Screen](#).
- perform an action that automatically resolves the tickler; for example when you release an order from hold, the system automatically resolves HO ticklers associated with the order.

When you resolve a tickler associated with an order, the system creates an order transaction history message indicating the tickler has been resolved.

For MN ticklers:

```
MN TICKLER# 000009999 HAS BEEN RESOLVED  
RES RSN(XXX) BY (USER/GROUP ID) NOTE (SHORT NOTE DEFINED FOR TICKLER)
```

For all other ticklers, where XX is the tickler event code:

```
XX TICKLER# 000009999 HAS BEEN RESOLVED  
RES RSN(XXX) BY (USER/GROUP ID) RULE (DESCRIPTION OF RULE ASSOCIATED WITH  
TICKLER)
```

You can review order transaction history at the [Display Order History Screen](#).

Workflow Management Setup

Purpose: To use workflow management, you must perform the necessary setup. Information requiring creation and setup includes:

- [System Control Value](#)
- [Secured Feature](#)
- [Number Assignment Value](#)
- [Menu Options](#)
- [Periodic Functions](#)

System Control Value

System Control Value	Description
Use Workflow Management (H96)	Select this field if you wish to use workflow management.

Secured Feature

Secured Feature	Description
Update All Ticklers (B09)	Eligible users can update all ticklers, regardless if the tickler is not assigned to him or his tickler user groups. Prohibited users cannot update all ticklers, only those ticklers assigned to him or his tickler user groups.
Create Manual Tickler (B13)	Eligible users can manually create ticklers. Prohibited users cannot manually create ticklers.

Number Assignment Value

Number Assignment	Description
Tickler Number	Assigns the next available number to a newly created tickler. Note: The system automatically creates this number assignment value when the first tickler is created.

Menu Options

Menu Option	Description
Working with Tickler User Groups (WTUG)	Allows you to create, change, and delete tickler user groups. For each tickler event and event rule, you can define the tickler user group the system assigns to a newly created tickler.
Working with User Records (WUSR)	Allows you to define the e-mail address the system uses when the user is notified of a tickler. Also, allows you to assign a tickler user group to a user.
Working with Tickler Category (WTCT)	Allows you to create, change, and delete a tickler category. Tickler categories are used to further group ticklers.
Working with Tickler Resolution Reasons (WTRR)	Allows you to create, change, and delete a tickler resolution reason. The system assigns a tickler resolution reason to a tickler once it is resolved. You can define the tickler resolution reason to use for ticklers associated with a particular event or event rule.
Working with Tickler Events (WTEV)	Allows you to change the settings for a tickler event, create, change, or delete event rules, and create or modify event rule procedures. Note: You must restart the async jobs in the Background Job Control menu option after you change an event or event rule, or create a new event rule.

Menu Option	Description
Working with Tickler Users/User Groups (WTIC)	Allows a user to review and work with ticklers assigned to him or his tickler user groups.
Workflow Management (WWFM)	Allows a supervisor to review and work with ticklers.
Purging Ticklers (MPTK)	Allows you to purge resolved ticklers, based on date.

Periodic Functions

Periodic Function	Description
Evaluate Create/Resolve Ticklers (program name PFR0072)	Evaluates the: • OO tickler event to determine if any open orders qualify for an OO event rule. Also, determines if any existing OO ticklers can be resolved. • UP tickler event to determine if any unconfirmed pick slips qualify for a UP event rule. Also, determines if any existing UP ticklers can be resolved. • AR tickler event to determine if any existing AR ticklers can be created or resolved. • Next notification date for an existing open or in process tickler to determine if the system sends an email to the tickler supervisor notifying him of the aged tickler.

Event Rule Settings

For each event rule you define for a tickler event, you can define:

- whether the event rule is active; see [Active Tickler Events and Rules](#).
- the tickler user/group assigned to work with ticklers created by this event rule and the supervisor to monitor the ticklers; see [Tickler Assignment](#).
- if tickler users are notified when a new tickler is created and if the supervisor is notified when a tickler remains unresolved for a certain number of days; see [Tickler Notification](#).
- the tickler category assigned to ticklers created by this event rule; see [Tickler Category](#).
- the tickler resolution reason assigned to ticklers created by this event rule; see [Tickler Resolution Reason](#).
- how the rules are processed; see [Event Rule Processing Sequence](#).
- the criteria the system action must meet to create a tickler; see [Event Rule Criteria](#).
- the procedures a user should follow to resolve the tickler; see [Event Rule Procedures](#).

You can define event rule settings at the [Create Tickler Event Rule Screen](#) or [Change Tickler Event Rule Screen](#).



Note:

If you create or change a tickler event rule, you must restart the asyns in the Background Job Control menu option before your updates are applied to new ticklers.

Event Rule Processing Sequence

For each event rule you create, you can define a processing sequence number. In addition, the system assigns a rule sequence number to each event rule, based on the order in which the rules were created (the first rule created is assigned rule sequence number 1, etc.).

The Processing sequence number defined for each event rule indicates the order in which the system evaluates event rules to determine if a tickler is created.

The event rule with the lowest processing sequence number is evaluated first (where 0 is the lowest number); the event rule with the highest processing sequence number is evaluated last.

If all of the event rules have the same processing sequence number, the system evaluates the rules in rule sequence order. The event rule with the lowest rule sequence number is evaluated first; the event rule with the highest rule sequence number is evaluated last.



Note:

If the event rule is not active (the Active field is unselected), the system does not evaluate the event rule and instead skips the rule and evaluates the next event rule, based on processing or rule sequence order.

Remember: Give the most important rule the lowest processing sequence number and the least important rule the highest processing sequence number. This way the system evaluates the rules in the order of the most important to the least important. This is especially true if you do not allow multiple ticklers: you want the system to create a tickler for the most important rule whose criteria are met by the system action.

If you allow multiple ticklers, you do not need to define a processing sequence number since the system creates a tickler for each rule whose criteria are met.

Example: This example displays the order in which the system evaluates tickler rules based on processing sequence number and rule sequence number.

Processing seq #	Rule seq #	Rule active?	Action meets criteria?	Results
0	2	N	N	The system does not create a tickler for this event rule since the event rule is not active and the system action does not qualify.
0	5	Y	N	The system does not create a tickler for this event rule since the system action does not qualify.
1	4	N	Y	The system does not create a tickler for this event rule since the event rule is not active.
2	1	Y	Y	The system creates a tickler for this event rule since the event rule is active and the system action qualifies.

Processing seq #	Rule seq #	Rule active?	Action meets criteria?	Results
3	3	Y	Y	The system creates a tickler for this event rule only if the Allow multiple ticklers field for the event is selected; see Allowing Multiple Ticklers .
3	6	Y	Y	The system creates a tickler for this event rule only if the Allow multiple ticklers field for the event is selected; see Allowing Multiple Ticklers .

Event Rule Criteria

For each event rule, you must define the criteria that the system action must meet to create a tickler. Different criteria display for each tickler event. You can create multiple rules for each event by defining different criteria for each rule.

You can define more than one criterion for each event rule; however, you must define at least one criterion. If you define more than one criterion for an event rule, the system action must meet all of the rule's criteria to create a tickler.

Example: If you create an event rule whose criteria are Pay type is 1 and Ship via is 1, the system creates a tickler only if the pay type on the order is 1 and the ship via is 1. The system does not create a tickler if the ship via on the order is 1 but the pay type on the order is 4.

Remember: If you allow multiple ticklers, you must think carefully before you create event rules. For example, if you create the following rules and you allow multiple ticklers, the system creates 3 ticklers, even though event rule 3 is a combination of rules 1 and 2:

- Event rule 1: Ship via is 1 (UPS)
- Event rule 2: Pay type is 1 (cash/check)
- Event rule 3: Ship via is 1 (UPS) and Pay type is 1 (cash/check)

You can define event rule criteria at the [Create Tickler Event Rule Screen](#).



Note:

You cannot create a duplicate event rule, meaning, you cannot create 2 rules that have the same criteria or an error message indicates: Duplicate rule exists.



Important:

If you create or change a tickler event rule, you must restart the asyns in the Background Job Control menu option before your updates are applied to new ticklers.

For more information: For more information on the criteria you can define for each tickler event, see:

- [BO \(Backorders\) Event Processing](#)

- CO (Cancelled Orders) Event Processing
- HO (Held Orders) Event Processing
- MN (Manually Created) Event Processing
- NO (New Orders) Event Processing
- OO (Aged Open Orders) Event Processing
- SD (SVC Activation Decline) Event Processing
- SO (Soldout Orders) Event Processing
- SV (SVC Number Assignment) Event Processing
- UP (Unconfirmed Pick Tickets) Event Processing
- VP (Voided Pick Tickets) Event Processing
- WF (Remote Workflow) Event Processing

Event Rule Procedures

For each event rule, you can create tickler instructions for a user to follow to resolve the tickler.

You can create and modify event rule procedures at the [Work with Tickler Event Rule Procedure Screen](#).

Example: These procedures may display for ticklers that are created when an order payment method is placed on AT (declined credit card hold) and the ship via is UPS Second Day.

1. Release order from hold.
2. Resend credit card for authorization.
3. Contact UPS to determine if they can deliver by expected arrival date.
4. If package will arrive late, notify customer of possible late delivery.
5. If customer is a valued customer, give customer 25% off coupon on next purchase.



Note:

A tickler user may not complete all of the tasks required to complete the tickler. Using the example above, the first assigned to user may release the order from hold and then assign the tickler to another user to resend the credit card for authorization.

Tickler work notes: The tickler user completing some or all of the tasks associated with the tickler can enter notes regarding the steps he performed for other users and the supervisor to review. See [Tickler Work Notes](#).

Work with Tickler Event Screen

Purpose: Use this screen to change, review, or define rules for a tickler event.

When you first advance to this screen, the system automatically creates the system delivered tickler events if the [Use Workflow Management \(H96\)](#) system control value is selected. However, you must still define settings for each tickler event you wish to enable. You cannot create other tickler events for the system to evaluate for tickler creation.

**Note:**

You cannot delete a tickler event. If you do not wish to use a tickler event, set the Active field for the event to unselected.

How to display this screen: Enter WTEV in the Fast path field or select Work with Tickler Event from a menu.

Field	Description
Event	A code that determines the system action for which the system may create a tickler. There are 11 system actions that can create ticklers. You cannot create other tickler events for the system to evaluate for tickler creation. BO: backorders; see BO (Backorders) Event Processing CO: cancelled orders; see CO (Cancelled Orders) Event Processing HO: held orders; see HO (Held Orders) Event Processing MN: manually created; see MN (Manually Created) Event Processing NO: new orders; see NO (New Orders) Event Processing OO: aged open orders; see OO (Aged Open Orders) Event Processing SD: stored value card activation decline; see SD (SVC Activation Decline) Event Processing SO: soldout orders; see SO (Soldout Orders) Event Processing SV: stored value card number assignment; see SV (SVC Number Assignment) Event Processing UP: unconfirmed pick tickets; see UP (Unconfirmed Pick Tickets) Event Processing VP: voided pick tickets; see VP (Voided Pick Tickets) Event Processing WF: remote workflow; see WF (Remote Workflow) Event Processing Alphanumeric, 2 positions; optional.
Description	A description of the tickler event. Alphanumeric, 40 positions; optional.
Cat (Tickler event category)	A code for the tickler category assigned to the tickler event. Tickler categories are used to group ticklers. Tickler categories are defined in and validated against the Tickler Category table; see Working with Tickler Category (WTCT). Alphanumeric, 3 positions; optional.
Pty (Tickler event priority)	The priority assigned to the tickler event, used to determine the importance of ticklers created for this event. Numeric, 1 position; optional.
Act (Tickler event active flag)	Indicates whether the tickler event is active. Selected = The tickler event is currently active; the system creates a tickler if the system action qualifies for an event rule. N = The tickler event is not currently active; the system does not create a tickler, regardless of whether the system action qualifies for an event rule. See Active Tickler Events and Rules.

Screen Option	Procedure
Change the settings of a tickler event	Select Change for a tickler event to advance to the Change Tickler Event Screen .
Display a tickler event	Select Display for a tickler event to advance to the Display Tickler Event Screen. You cannot change any information at this screen. See the Change Tickler Event Screen for field descriptions.
Work with tickler event rules	Select Rules for a tickler event to advance to the Work with Tickler Event Rule Screen . You cannot define event rules for the MN (manually created) or SV (SVC number assignment) tickler events.

Create Tickler Event Rule Screen

Purpose: Use this screen to create an event rule for a specific tickler event.

This screen is divided into 2 areas:

- The top half of the screen displays the event rule settings, such as who to notify, the tickler category, resolution reason, and processing sequence number; see [Event Rule Settings](#).
- The bottom half of the screen displays the event rule options, or criteria, that must be met by the system action in order for the system to create a tickler. The event rule options are different for each tickler event.

For each event rule you create, you must define at least one event rule option, or criterion, the system uses to determine if a tickler should be created. If you define more than one rule criterion, the system action must meet all of the options defined for the event rule to create a tickler.



Note:

You cannot create a duplicate event rule, meaning, you cannot create 2 rules that have the same criteria or an error message indicates: Duplicate rule exists.

The Processing sequence number defined for each event rule determines the sequence in which the system validates each event rule to determine if a tickler should be created, 1 being the first priority. You should assign the most important event rules a lower sequence number.



Important:

If you create or change an event rule, you must restart the async jobs in the Background Job Control menu option before your updates are applied to new ticklers.

How to display this screen: Select Create at the [Work with Tickler Event Rule Screen](#).

Field	Description
Event	The code and description for the tickler event associated with the event rule. Code: Alphanumeric, 2 positions; display-only. Description: Alphanumeric, 40 positions; display-only.
Rule description	A description of the event rule, usually indicating the criteria defined for the rule. Alphanumeric, 40 positions; required.
Category	A code for the tickler category assigned to the event rule. Tickler categories are used to group ticklers. The tickler category at the event level defaults, but you can override it. The tickler category defined at the event rule level overrides the tickler category defined at the event level. Tickler categories are defined in and validated against the Tickler Category table; see Working with Tickler Category (WTCT). Alphanumeric, 3 positions; optional.
Resolution reason	A code for the reason why a tickler for this event rule is resolved. Tickler resolution reason codes are assigned to a tickler once the tickler has been resolved. The resolution reason at the event level defaults, but you can override it. The resolution reason defined at the event rule level overrides the resolution reason defined at the event level. You must define a tickler resolution reason for all tickler events except for the MN (manually created) tickler event. Tickler resolution reasons are defined in and validated against the Tickler Resolution Reason table; see Working with Tickler Resolution Reasons (WTRR). Alphanumeric, 3 positions; required except for MN tickler event.
Active	Indicates whether the event rule is active. selected = The event rule is currently active; the system creates a tickler for the event rule if its criteria are met by the system action. Remember, to create a tickler for the event rule, the Active flag at the event level must also be selected. unselected = The event rule is not currently active; the system does not create a tickler, regardless of whether the system action qualifies for the event rule. See Active Tickler Events and Rules.
Processing seq	The processing sequence number for the event rule. The processing sequence number defines the order in which the system evaluates the rules to determine if a tickler is created, from lowest sequence number to highest. Note: The first tickler event rule that meets the criteria creates a tickler. It is important that you assign the most important event rule the lowest processing sequence number. If you do not define a processing sequence number for an event rule, the system assigns the event rule a processing sequence number of 0. If all of the rules have the same processing sequence number, the system evaluates the rules in rule sequence number. See Event Rule Processing Sequence. Numeric, 3 positions; optional.

Field	Description
Notify user/group	Indicates whether the system sends a Tickler Notification email to the assigned user or to all of the users in the assigned tickler user group when a tickler is created for this event rule. selected = Notify the assigned user/user group when a tickler is created; use the email address defined for the user in the User Extended table. If the tickler is assigned to a user group, send a notification to each user in the group, using the email address defined for each user in the User Extended table. unselected = Do not notify the assigned user/user group when a tickler is created; the user can review the ticklers in his queue at the Work with Tickler Screen (user/group view). The notify user/group setting at the event level defaults, but you can override it. The notify user/group setting at the event rule level overrides the notify user/group setting defined at the event level. See Tickler Notification for a sample Tickler Notification email.
Assign to orig user	Indicates if ticklers created for this event rule are assigned to the user that entered the order associated with the tickler. selected = Assign ticklers created for this event rule to the user that entered the associated order. If this field is selected, you must also enter a user ID in the Assign to user field. unselected = Do not assign ticklers created for this event rule to the user that entered the associated order; instead, assign the tickler to the specified user or tickler user group. The assign to original user setting at the event level defaults, but you can override it. The tickler assignment defined at the event rule level overrides the tickler assignment defined at the event level. Note: See Tickler Assignment.
Assign to user	The user ID of the user the system assigns to ticklers for this event rule. The assign to user setting at the event level defaults, but you can override it. The assign to setting at the event rule level overrides the assign to setting defined at the event level. You can define either an assign to user or assign to user group for the event rule, but not both. Users are defined in and validated against the User table; see Working with User Records (WUSR). See Tickler Assignment. Alphanumeric, 10 positions; optional.
Assign to user group	The tickler user group the system assigns to ticklers for this event rule. The assign to user group setting at the event level defaults, but you can override it. The assign to setting at the event rule level overrides the assign to setting defined at the event level. You can define either an assign to user or assign to user group for each event, but not both. The tickler user group you enter must be defined as a user type and not a supervisor type. Tickler user groups are defined in and validated against the Tickler User Group table; see Working with Tickler User Groups (WTUG). See Tickler Assignment. Alphanumeric, 10 positions; optional.

Field	Description
Supervisor group	The tickler supervisor group the system assigns to ticklers for this event rule. The supervisor group setting at the event level defaults, but you can override it. The supervisor group at the event rule level overrides the supervisor group defined at the event level. The tickler user group you enter must be defined as a supervisor type and not a user type. Tickler user groups are defined in and validated against the Tickler User Group table; see Working with Tickler User Groups (WTUG). See Tickler Assignment. Alphanumeric, 10 positions; optional.
Notify supervisor	Indicates when a Supervisor Notification Count email is sent to the supervisor, based on the number of days since a tickler was created. The system uses this calculation to determine the next notification date when a tickler is first created: tickler creation date + value in Number of days to notify supervisor field for the event/rule that created the tickler = next notification date. The system does not update the next notification date after a tickler is created. The system sends the email to the email address defined for the supervisor user group in the Tickler User Group table. The system continues sending an email to the supervisor group as long as a tickler assigned to the supervisor group is in an open or in process status and the Next notification date in the Tickler table is equal to or past the current date. If the next notification date is a future date, the system does not send an email until the next notification date is reached. If all ticklers assigned to the supervisor are resolved, the system no longer sends a Supervisor Notification Count email. Leave this field blank if you do not want to notify the supervisor about aging ticklers for this event rule; the supervisor can review ticklers using the Workflow Management (WWFM) menu option. The notify supervisor setting at the event level defaults, but you can override it. The notify supervisor setting at the event rule level overrides the notify supervisor setting defined at the event level. If you define a number of days in this field, you must also define the supervisor group. See Tickler Notification for a sample Supervisor Notification Count email. Numeric, 3 positions; optional.

Event rule options: For each event rule, you must define the options, or criteria, that must be met by the system action in order for the system to create a tickler. The event rule options are different for each tickler event. You must define at least one option, or criterion, for each tickler event rule. For more information on defining event rule options, see:

- [BO \(Backorders\) Event Processing](#)
- [CO \(Cancelled Orders\) Event Processing](#)
- [HO \(Held Orders\) Event Processing](#)
- [MN \(Manually Created\) Event Processing](#)
- [NO \(New Orders\) Event Processing](#)
- [OO \(Aged Open Orders\) Event Processing](#)
- [SD \(SVC Activation Decline\) Event Processing](#)

- [SO \(Soldout Orders\) Event Processing](#)
- [SV \(SVC Number Assignment\) Event Processing](#)
- [UP \(Unconfirmed Pick Tickets\) Event Processing](#)
- [VP \(Voided Pick Tickets\) Event Processing](#)
- [WF \(Remote Workflow\) Event Processing](#)

BO (Backorders) Event Processing

The system creates a tickler for the BO tickler event when an item on an order is placed on backorder and the order qualifies for a BO event rule.

When is the BO event evaluated? The system evaluates the BO event when you or the system place an item on backorder:

- during order entry processing
- during order maintenance processing
- during batch order entry (this includes orders received via the phone order interface and ecommerce)
- when you void and unreserve a pick ticket in order maintenance or in the [Reprinting and Voiding Pick Slips \(WVRP or WSVP\)](#) menu option
- when you unreserve an item during the [Working with Interactive Reservation \(MIRV\)](#) menu option

Allowing multiple ticklers for the BO event:

- If you allow multiple ticklers, the system creates multiple ticklers for an order that contains one or more backordered items; a separate tickler is created for each event rule whose criteria are met.
- If you do not allow multiple ticklers, the system creates only 1 tickler per order ship to that contains one or more items on backorder, regardless of whether the backordered order qualifies for more than one event rule; the system does not create a separate tickler for each transaction that backorders an item on the order.

BO Event Rule Criteria

You can define the following criteria for a BO event rule.



Note:

The system creates a separate tickler for each ship to order that has a backordered item that meets the rule's criteria, regardless of the Allow multiple ticklers setting.

Criterion	Event rule set up
An item is placed on backorder by a batch process, such as voiding and unreserving a pick ticket or unreserving an item during Interactive Reservation.	Deselect the Initial backorder field.

Criterion	Event rule set up
The backordered item was initially backordered in order entry/maintenance and not by some other program.	Select the Initial backorder field.
The life-to-date order dollars for the sold to customer (the \$ orders LTD field in the Customer Sold To Order History table) on the order meets the comparison criteria on the event rule.	Enter a comparison value (valid values are GT greater than, GE greater than or equal to, LT less than, LE less than or equal to) in the Comparison field and a dollar amount in the LTD order dollars field. You can only define a whole number for the life-to-date order dollars. You can review the life-to-date order dollars for a sold to customer at the Display Customer Order History Screen.
The customer class for the sold to customer on the order matches the customer class on the event rule.	Enter a customer class in the Customer class field. Note: The system does not look at the customer class defined for the ship to customer.
The item and/or SKU on backorder matches the item and/or SKU on the event rule.	Enter an item code in the Item field and optionally, a SKU code in the SKU field. If you define an item but not a SKU code and the item contains SKUs, the system creates a tickler for the item if any of the SKUs for the item are on backorder. If you define both an item and SKU, the system creates a tickler only if that specific SKU is on backorder.
The item status for the item on backorder matches the item status on the event rule.	Enter an item status in the Item status field.
The item class for the item on backorder matches the item class on the event rule.	Enter an item class in the Item class field.
The ship via for the order line or order where the item on backorder is located matches the ship via on the event rule.	Enter a ship via code in the Ship via field. The system evaluates the ship via on the detail line first, then the ship via on the order header. If you enter a Ship via, you cannot define a Ship via priority for the event rule. Note: To create a tickler for each ship to order, the ship via for the ship to must match the ship via on the event rule.
The priority of the ship via for the order line or order where the item on backorder is located matches the ship via priority on the event rule.	Enter a ship via priority number in the Ship via priority field. The system evaluates the ship via on the detail line first, then the ship via on the order header. If you enter a Ship via, you cannot define a Ship via priority for the event rule. Note: To create a tickler for each ship to order, the ship via priority for the ship to must match the ship via priority on the event rule.

BO Event Examples

Example 1: Allow multiple ticklers is unselected for the BO event.

The following event rules are defined for the BO event, displayed in processing sequence order.

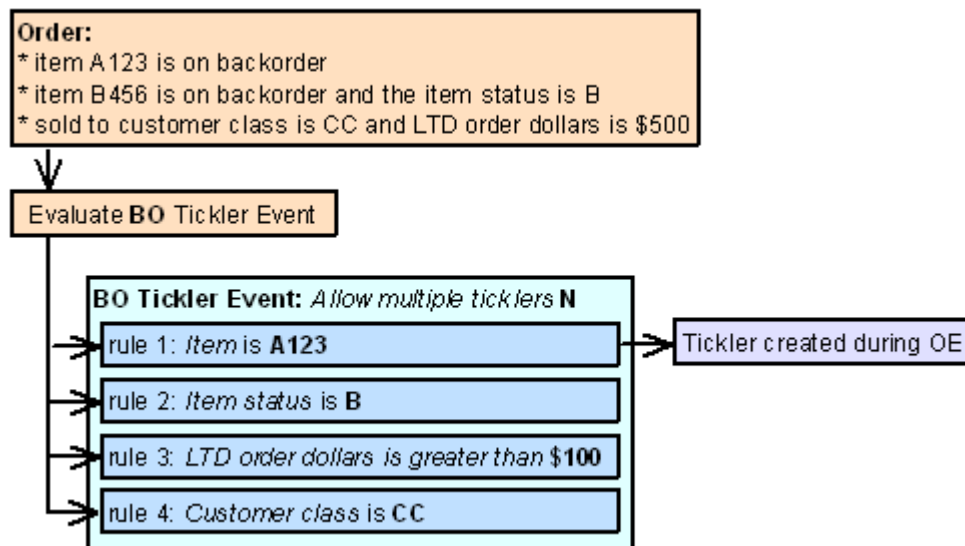
- Event rule 1: Item is A123.
- Event rule 2: Item status is B.
- Event rule 3: LTD order dollars is greater than \$100.
- Event rule 4: Customer class is CC.

You enter an order and:

- item A123 is on backorder.
- item B456 is on backorder and the item status is B.
- the sold to customer's class is CC and life-to-date order dollars is \$500.

The system creates 1 tickler for rule 1: Item is A123.

In this scenario, the system creates only 1 tickler for the order containing backordered items even though the order qualified for all of the event rules.



Example 2: Allow multiple ticklers is selected for the BO event.

The following event rules are defined for the BO event, displayed in processing sequence order.

- Event rule 1: Item is A123.
- Event rule 2: Item status is B.
- Event rule 3: LTD order dollars is greater than \$100.
- Event rule 4: Customer class is CC.

You enter an order and:

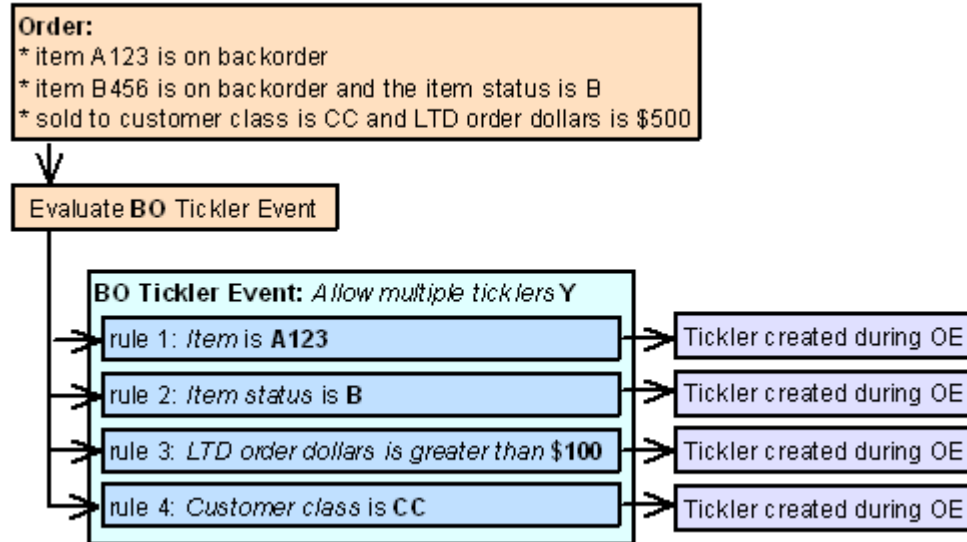
- item A123 is on backorder.
- item B456 is on backorder and the item status is B.
- the sold to customer's class is CC and life-to-date order dollars is \$500.

The system creates 4 ticklers for the order:

- the first tickler is created for rule 1: Item is A123.

- the second tickler is created for rule 2: Item status is B.
- the third tickler is created for rule 3: LTD order dollars is greater than \$100.
- the fourth tickler is created for rule 4: Customer class is CC.

In this scenario, the system creates 4 ticklers for the order containing backordered items; a separate tickler is created for each rule whose criteria are met.



Resolving BO Ticklers

A BO tickler is resolved when you or the system:

- select Resolve for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or [Workflow Management Screen](#).
- receive inventory for the backordered item.
- cancel the order containing the backordered item.

CO (Cancelled Orders) Event Processing

The system creates a tickler for the CO tickler event when an order is cancelled or contains an order line that is cancelled and the order qualifies for a CO event rule.

When is the CO event evaluated? The system evaluates the CO event when you or the system cancels an order or order line during:

- order maintenance
- [Working with Backorders Pending Cancellation \(WBPC\)](#)
- [Processing Item Substitutions \(PSUB\)](#)
- [Working with Credit Card Cancellations \(WCCC\)](#)
- [Processing Auto Soldout Cancellations \(MASO\)](#)

Allowing multiple ticklers for the CO event:

- If you allow multiple ticklers, the system creates multiple ticklers for an order that is cancelled or contains cancelled order lines; a separate tickler is created for each event rule whose criteria are met.

- If you do not allow multiple ticklers, the system creates only 1 tickler per order ship to that contains a cancelled order/order line, for example if 1 tickler is created during order maintenance another tickler cannot be created during Process Auto Soldout Cancellations.

CO Event Rule Criteria

You can define the following criteria for a CO event rule.



Note:

The system creates a separate tickler for each ship to order that has a cancelled order line and meets the rule's criteria, regardless of the Allow multiple ticklers setting. When you cancel an order, the system creates a separate tickler for each ship to order you cancel.

Criterion	Event rule set up
The order or order line is cancelled, regardless of whether it is by a batch process or interactively.	Deselect the Batch process only field.
The order or order line is cancelled by a batch process and not interactively.	Select the Batch process only field. You can cancel an order/order line during a batch process using: • Processing Item Substitutions (PSUB) • Working with Credit Card Cancellations (WCCC) • Processing Auto Soldout Cancellations (MASO)
The life-to-date order dollars for the sold to customer (the \$ orders LTD field in the Customer Sold To Order History table) on the order meets the comparison criteria on the event rule.	Enter a comparison value (GT greater than, GE greater than or equal to, LT less than, LE less than or equal to) in the Comparison field and a dollar amount in the LTD order dollars field. You can only define a whole number for the life-to-date order dollars. You can review the life-to-date order dollars for a sold to customer at the Display Customer Order History Screen .
The customer class for the sold to customer on the order matches the customer class on the event rule.	Enter a customer class in the Customer class field. Note: The system does not look at the customer class defined for the ship to customer.
The item and/or SKU on the cancelled order line matches the item and/or SKU on the event rule.	Enter an item code in the Item field and optionally, a SKU code in the SKU field. If you define an item but not a SKU code and the cancelled item contains SKUs, the system creates a tickler for the item if any of the SKUs for the item are cancelled. If you define both an item and SKU, the system creates a tickler only if that specific SKU is cancelled.
The item status for the item on the cancelled order line matches the item status on the event rule.	Enter an item status in the Item status field.

Criterion	Event rule set up
The item class for the item on the cancelled order line matches the item class on the event rule.	Enter an item class in the Item class field.
The cancel reason on the cancelled order line/order matches the cancel reason on the event rule.	Enter a cancel reason code in the Cancel reason field.
The ship via for the cancelled order/order line matches the ship via on the event rule.	Enter a ship via code in the Ship via field. The system evaluates the ship via on the detail line first, then the ship via on the order header. If you enter a Ship via, you cannot define a Ship via priority for the event rule. Note: To create a tickler for each ship to order, the ship via for the ship to customer must match the ship via on the event rule.
The priority of the ship via for the cancelled order/order line matches the ship via priority on the event rule.	Enter a ship via priority number in the Ship via priority field. The system evaluates the priority of the ship via on the detail line first, then the priority of the ship via on the order header. If you enter a Ship via priority, you cannot define a Ship via for the event rule. Note: To create a tickler for each ship to order, the priority of the ship via for the ship to customer must match the ship via priority on the event rule.

CO Event Examples

Example 1: Allow multiple ticklers is unselected for the CO event.

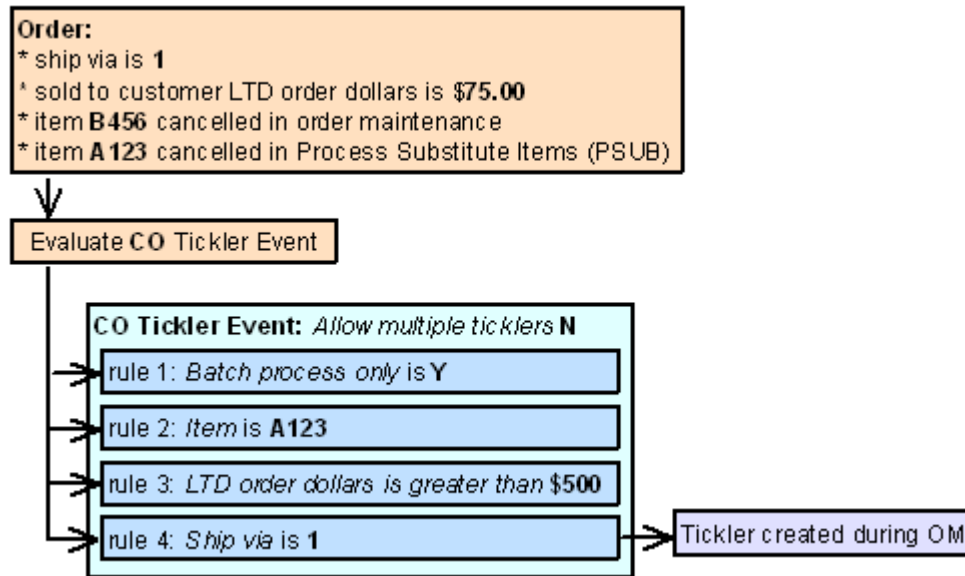
The following event rules are defined for the CO event, displayed in processing sequence order.

- Event rule 1: Batch process only is selected
- Event rule 2: Item is A123
- Event rule 3: LTD order dollars is greater than 500
- Event rule 4: Ship via is 1

You enter an order and:

- the ship via on the order header is 1.
- the items on the order are A123 and B456.
- the sold to customer's life-to-date order dollars is \$75.00.
- in order maintenance, you cancel order line 1 for item B456.
- in Processing Item Substitutions (PSUB), you cancel item A123.

In this scenario, the system creates 1 tickler during order maintenance for rule 4: Ship via is 1. The system does not create a tickler for the other rules whose criteria are met. The system does not create a tickler during Process Substitute Items since a CO tickler already exists for the order/order ship to.



Example 2: Allow multiple ticklers is selected for the CO event.

The following event rules are defined for the CO event, displayed in processing sequence order.

- Event rule 1: Batch process only is selected
- Event rule 2: Item is A123
- Event rule 3: LTD order dollars is greater than 500
- Event rule 4: Ship via is 1

You enter an order and:

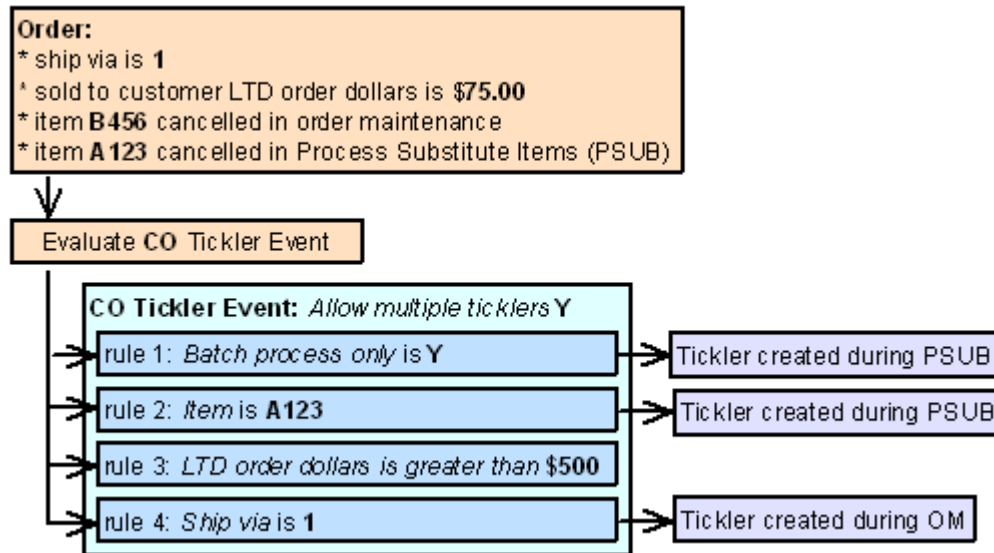
- the ship via on the order header is 1.
- the items on the order are A123 and B456.
- the sold to customer's life-to-date order dollars is \$75.00.
- in order maintenance, you cancel order line 1 for item B456.
- in Processing Item Substitutions (PSUB), you cancel item A123.

In this scenario, the system creates 1 tickler during order maintenance for rule 4: Ship via is 1.

The system creates 2 ticklers during Process Substitute Items:

- the first tickler is created for rule 1: Batch process only is selected.
- the second tickler is created for rule 2: Item is A123.

A tickler is not created for rule 3 during Process Substitute Items because a tickler already exists for that order using that rule.



Resolving CO Ticklers

A CO tickler is resolved when you or the system select Resolve for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or [Workflow Management Screen](#).

HO (Held Orders) Event Processing

The system creates a tickler for the HO tickler event when an order's order header, order ship to (recipient), or order payment method is placed on hold and the order qualifies for an HO event rule. The system does not create a tickler for an order line placed on hold.

When is the HO event evaluated? The system evaluates the HO event when you or the system place an order on hold during:

- order entry processing
- order maintenance processing
- batch order entry (this includes orders received via the phone order interface and ecommerce)
- credit card authorization (during order entry (online authorization), pick slip generation, and drop ship processing)

Allowing multiple ticklers for the HO event:

- If you allow multiple ticklers, the system creates multiple ticklers for an order or order payment method that is held; a separate tickler is created for each event rule whose criteria are met.
- If you do not allow multiple ticklers, the system creates only 1 tickler per order ship to that places an order or order payment method on hold, for example if the system creates 1 HO tickler during order entry the system will not create another HO tickler during credit card authorizations.

HO Event Rule Criteria

You can define the following criteria for an HO event rule.

**Note:**

The system creates a separate tickler for each ship to customer order that meets the rule's criteria, regardless of the Allow multiple ticklers setting.

Criterion	Event rule set up
The order hold reason for the held order matches the order hold reason on the event rule.	Enter a hold reason in the Order hold reason field. This setting is used for order header holds and recipient holds. The system creates a tickler for both system and user hold reasons.
The pay type for the held order matches the pay type on the event rule.	Enter a pay type code in the Pay type field.
The pay type hold reason for the held order payment method matches the pay type hold reason on the event rule.	Enter a hold reason in the Pay type hold reason field. The system creates a tickler for both system and user hold reasons. Note: The system does not create a tickler for the CW (awaiting credit card authorization) pay type hold.
The order total for the held order meets the order total comparison on the event rule.	Enter a comparison value (valid values are GT greater than, GE greater than or equal to, LT less than, LE less than or equal to) in the Comparison field and a dollar amount in the Order total field. You can only define a whole number for the order total. The order total is the sum of all charges on the order, including merchandise, freight, additional freight, tax, handling, and additional charges across all recipients on the order.
The ship via for the held order/order line matches the ship via on the event rule.	Enter a ship via code in the Ship via field. The system evaluates the ship via on the detail line first, then the ship via on the order header. If you enter a Ship via, you cannot define a Ship via priority for the event rule. Note: To create a tickler for each ship to order, the ship via for the ship to customer must match the ship via on the event rule.
The priority of the ship via for the held order/order line matches the ship via priority on the event rule.	Enter a ship via priority number in the Ship via priority field. The system evaluates the priority of the ship via on the detail line first, then the priority of the ship via on the order header. If you enter a Ship via priority, you cannot define a Ship via for the event rule. Note: To create a tickler for each ship to order, the priority of the ship via for the ship to customer must match the ship via priority on the event rule.

HO Event Examples

Example 1: Allow multiple ticklers is selected for the HO event.

The following event rules are defined for the HO event, displayed in processing sequence order.

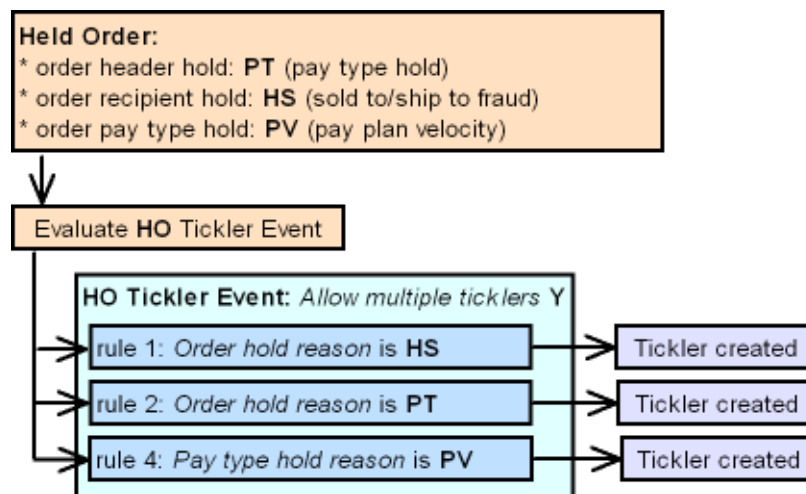
- Event rule 1: Order hold reason is HS (sold to/ship to fraud)
- Event rule 2: Order hold reason is PT (pay type hold)
- Event rule 3: Pay type hold reason is PV (pay plan velocity hold)

You enter an order and:

- the sold to customer on the order is a fraud (F in the Hold/bypass/fraud field for the customer). The system places the order ship to customer on HS (sold to/ship to fraud).
- the order pay type on the order is credit card with deferred payment and the card has been used too many times within a specified time period with a deferred payment option. The system places the order header on PT (pay type) hold and the order pay type on PV (pay plan velocity) hold.

In this scenario, the system creates 3 ticklers:

- the first tickler is created for the order ship to hold using rule 1: Order hold reason is HS (sold to/ship to fraud).
- the second tickler is created for the order header hold using rule 2: Order hold reason is PT (pay type hold).
- the third tickler is created for the pay type hold using rule 3: Pay type hold reason is PV (pay plan velocity hold)



Example 2:

Allow multiple ticklers is unselected for the HO event.

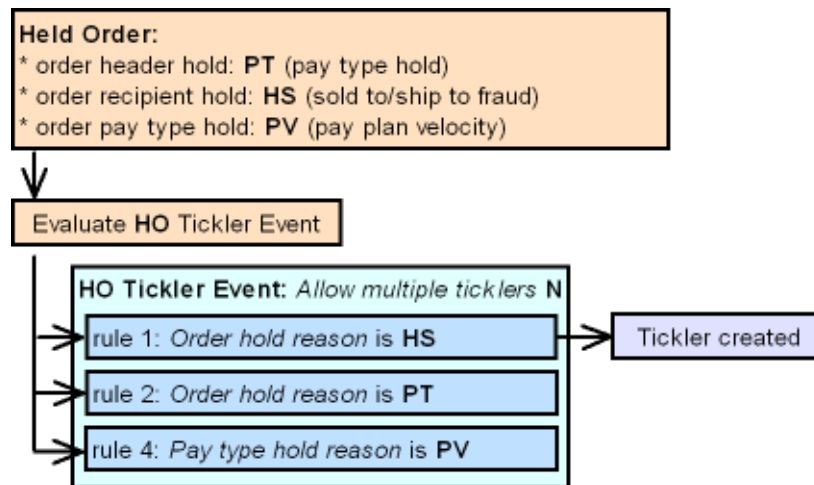
The following event rules are defined for the HO event, displayed in processing sequence order.

- Event rule 1: Order hold reason is HS (sold to/ship to fraud)
- Event rule 2: Order hold reason is PT (pay type hold)
- Event rule 4: Pay type hold reason is PV (pay plan velocity hold)

You enter an order and:

- the sold to customer on the order is a fraud (F in the Hold/bypass/fraud field for the customer). The system places the order ship to customer on HS (sold to/ship to fraud).
- the order pay type on the order is credit card with deferred payment and the card has been used too many times within a specified time period with a deferred payment option. The

system places the order header on PT (pay type) hold and the order pay type on PV (pay plan velocity) hold.



In this scenario, the system creates 1 tickler for the order ship to hold using the first rule: Order hold reason is HS (sold to/ship to fraud). The system does not create a tickler for the other rules whose criteria are met.

Resolving HO Ticklers

An HO tickler is resolved when you:

- select Resolve for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or [Workflow Management Screen](#).
- release the order from hold by selecting Release for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or [Workflow Management Screen](#).
- release the order from hold by selecting Release for a tickler in the Release Held Orders menu option; see [Performing the Release](#).
- release the order from hold in order maintenance by:
 - removing the order header hold reason.
 - adding a pay type for a balance due hold.

MN (Manually Created) Event Processing

You can manually create a tickler at the [Create Tickler Screen](#).

How to display this screen: You can advance to the Create Tickler screen from the:

- [Workflow Management Screen](#) (workflow supervisor)
- [Work with Tickler Screen \(user/group view\)](#) (workflow user)
- [Work with Ticklers Screen \(sold to customer view\)](#)
- [Work with Ticklers Screen \(ship-to customer view\)](#)
- [Work with Ticklers Screen \(bill-to customer view\)](#)
- [Work with Ticklers Screen \(order view\)](#)
- [Work with Return Authorization Detail Screen](#)
- [Work with Returns for Order Screen](#)
- [Work with Email by Order Number Screen](#)

- [Work with Email by Customer Sold To Number Screen](#)
- [Work with Email by Customer Ship To Number Screen](#)
- [Work with Email by Customer Bill To Number Screen](#)
- [Display Item Availability Screen](#)

Allowing multiple ticklers for the MN event: The Allow multiple ticklers setting does not apply to manually created ticklers.

MN event rule criteria: You cannot define event rules for the MN tickler event. However, you can associate a manually created tickler with a specific:

- order number and ship to number
- customer sold to number
- customer ship to number
- customer bill to number
- existing tickler number

Depending on how you advance to the Create Tickler screen, the system automatically associates the tickler with a specific order or customer. For example, if you advance to the Create Tickler screen from the [Work with Ticklers Screen \(sold to customer view\)](#), the system automatically associates the manually created tickler with the sold to customer.

Resolving MN Ticklers

A MN tickler is resolved when you select Resolve for a tickler at the Work with Tickler Screen (user/group view) or [Workflow Management Screen](#).

NO (New Orders) Event Processing

The system creates a tickler for the NO tickler event when the status of an order line updates to open or closed and the order qualifies for an NO event rule.

The system creates a tickler for each order containing one or more order lines that are updated to open or closed; the system does not create a separate tickler for each order line that is updated to open or closed.

Soldout orders: The system will never create an NO tickler for an order that is entirely soldout; this is because none of the lines on the order are ever updated to open or closed.



Note:

Even if a NO tickler exists for an order, the order can continue through the order cycle.

When is the NO event evaluated? The system evaluates the NO event when an order:

- is accepted (because the status of an order line updates from suspended to open), before creating a pre-generated pick. If a web order is placed in an error status in an order batch, the system evaluates the NO event when you edit and accept the order batch. **Note:** The system does not evaluate the NO event when you accept an order in order maintenance.
- is processed through the Billing Async (because the status of an order line updates to closed).

Allowing multiple ticklers for the NO event:

- If you allow multiple ticklers, the system creates multiple ticklers for an order containing one or more order lines that are updated to open or closed; a separate tickler is created for each event rule whose criteria are met.
- If you do not allow multiple ticklers, the system creates only 1 tickler for an order containing one or more order lines that are updated to open or closed, regardless of whether the order qualifies for more than one event rule; the system does not create a separate tickler for each transaction that updates or closes an order.

NO Event Rule Criteria

You can define the following criteria for an NO event rule.

The Order line status setting is used with all other criteria you define for an event rule. For example, if you define an item status, the item on the order line must match the specified item status and the status of the order line must update to open or closed (whichever order line status you specify).

Hold reason: If you enter a valid hold reason in the Hold reason field, the system places the order on hold at the user level when a NO tickler is created for the event rule. In this situation, the system removes any pick slip preparation from the order; see [Preparing Orders for Pick Slip Generation](#).

**Note:**

Unless otherwise noted, the system creates a separate tickler for each ship to customer on the order that has an open/closed order line that qualifies for an event rule, regardless of the Allow multiple ticklers setting.

Criterion	Event rule set up
The order line status changes to open/closed.	Enter an order line status code in the Order line status field. blank = The order line status changes to open; for example, you enter a new order line. X = the order line status changes to closed; for example, you ship an order line.
The ordered quantity or shipped quantity for the open/closed order line is equal to or greater than the quantity on the event rule.	Enter a quantity in the Quantity ordered/shipped field. • the quantity represents the ordered quantity if the Order line status is blank. • the quantity represents the shipped quantity if the Order line status is X.
The item status for the item on the open/closed order line matches the item status on the event rule.	Enter an item status in the Item status field.
The open/closed order line is for a first time buyer.	Select the First time buyer field. The system considers the sold to customer a first time buyer if the Current mail type field for the customer is a value other than B (buyer). Note: The system creates one tickler for the first ship to order if the sold to customer on the order qualifies; the system does not create a tickler for subsequent ship to orders.

Criterion	Event rule set up
The item class for the item on the open/closed order line matches the item class on the event rule.	Enter an item class in the Item class field.
The item and/or SKU on the open/closed order line matches the item and/or SKU on the event rule.	Enter an item code in the Item field and optionally, a SKU code in the SKU field. If you define an item but not a SKU code and the item contains SKUs, the system creates a tickler for the item if any of the SKUs for the item are on an open/closed order line. If you define both an item and SKU, the system creates a tickler only if that specific SKU is on an open/closed order line.
The order type on the order matches the order type on the event rule.	Enter an order type in the Order type field. Note: A tickler is created for each ship to order whose order type matches the order type on the event rule.
The last order date for the sold to customer (the Last order field in the Customer Sold To Order History table) on the order is past the current date by the number of days on the event rule.	Enter a number in the Number days since field. You can review the last order date for a sold to customer on the Display Customer Order History Screen. Note: The system does not create a separate tickler for each ship to.
The country code on the ship to order matches the country code on the event rule.	Enter a country code in the Country field. Note: A tickler is created for each ship to order whose country code matches the country code on the event rule. If you define a country code you cannot exclude the default country.
The country code on the ship to order must be a country other than the Default Country for Customer Address (B17) .	Select the Exclude default country field. Note: A tickler is created for each ship to order whose country code qualifies for the event rule. If you exclude the default country you cannot define a country code.
The order total on the order meets the order dollars comparison criteria on the event rule.	Enter a comparison value (valid values are GT greater than, GE greater than or equal to, LT less than, LE less than or equal to) in the Comparison field and a dollar amount in the Order dollars field. The order total is the sum of all charges on the order, including merchandise, freight, additional freight, tax, handling, and additional charges across all recipients on the order. You can only define a whole number for the order dollars.
The ship via code on the order line or order header matches the ship via code on the event rule.	Enter a ship via code in the Ship via field. Ship via codes are defined in and validated against the Ship Via table. The system evaluates the ship via on the detail line first, then the ship via on the order header. A tickler is created for each ship to order whose ship via code at the line level or header level matches the ship via code on the event rule. If you enter a Ship via, you cannot define a Ship via priority for the event rule.

Criterion	Event rule set up
The priority for the ship via code on the order line or order header matches the ship via priority on the event rule.	Enter a ship via priority (1-9) in the Ship via priority field. The system evaluates the ship via on the detail line first, then the ship via on the order header. A tickler is created for each ship to order whose ship via code at the line level or header level has a ship via priority that matches the ship via priority on the event rule. If you enter a Ship via priority, you cannot define a Ship via for the event rule.

NO Event Examples

Example 1: Allow multiple ticklers is selected for the NO event.

The following event rules are defined for the NO event, displayed in processing sequence order.

- Event rule 1: Order line status is blank and Order type is I.
- Event rule 2: Order line status is X.
- Event rule 3: Order line status is blank and Exclude default country is selected.

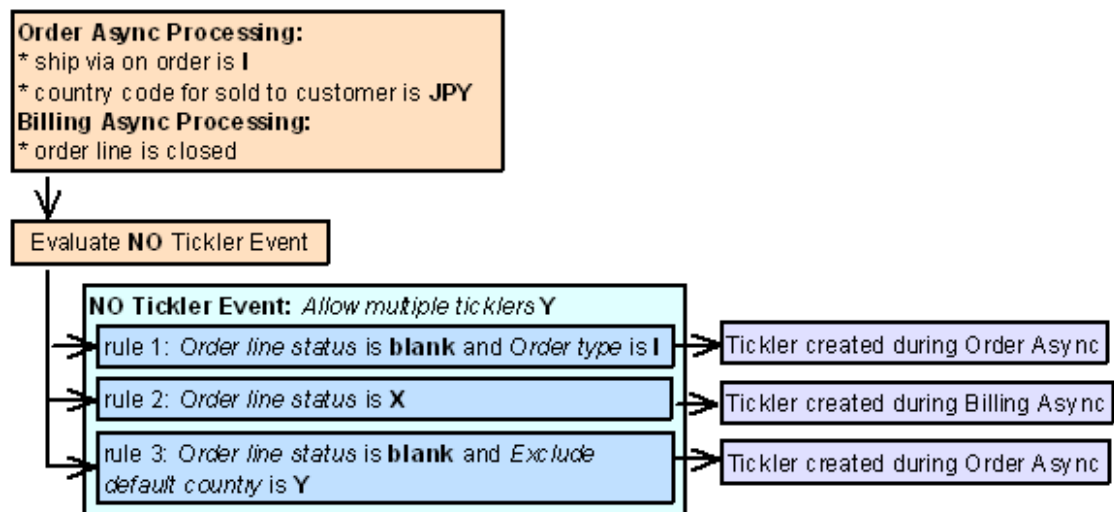
You enter an order and:

- the order type is I.
- the country code on the order is JPY (the default country code is USA).

In this scenario, the system creates 2 ticklers when the order is processed by the Order Async:

- the first tickler is created for rule 1: Order line status is blank and Order type is I.
- the second tickler is created for rule 3: Order line status is blank and Exclude default country is selected.

You generate a pick ticket and ship the order. The system creates 1 tickler when the order is processed by the Billing Async for rule 2: Order line status is X.



Example 2: Allow multiple ticklers is unselected for the NO event.

The following event rules are defined for the NO event, displayed in processing sequence order.

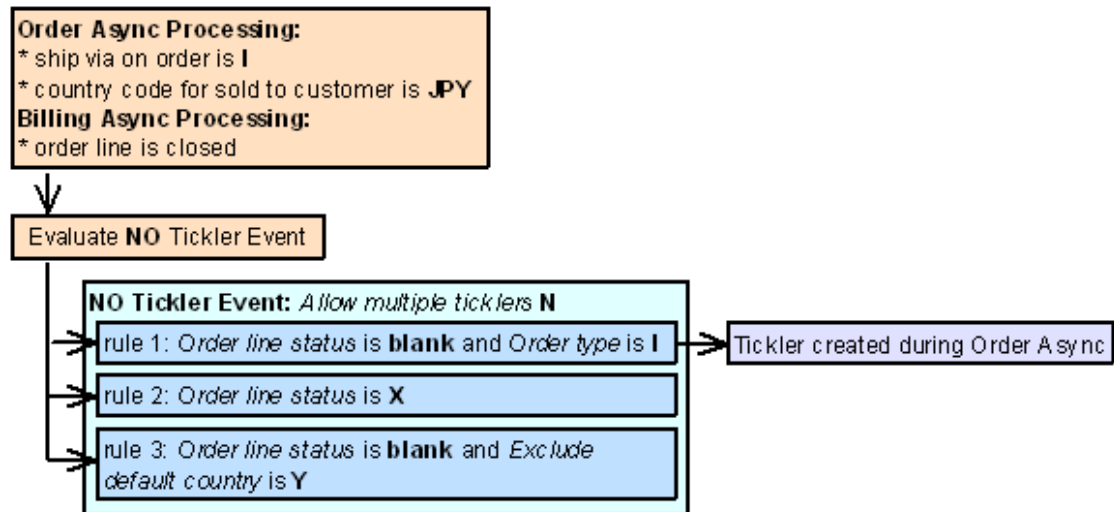
- Event rule 1: Order line status is blank and Order type is I.
- Event rule 2: Order line status is X.
- Event rule 3: Order line status is blank and Exclude default country is selected.

You enter an order and:

- the order type is I.
- the country code on the order is JPY (the default country code is USA).

In this scenario, the system creates 1 tickler when the order is processed by the Order Async for rule 1: Order line status is blank and Order type is I.

You generate a pick ticket and ship the order. The system does not create a tickler when the order is processed by the Billing Async.



Resolving NO Ticklers

A NO tickler is resolved when you:

- select Resolve for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or [Workflow Management Screen](#).
- use [Manage Held Orders](#) in Modern View to release the order from hold. The system resolves the tickler when you release the order from hold only if the reason the order was held was because of the tickler and a resolution reason is defined for the tickler event rule.

OO (Aged Open Orders) Event Processing

The system creates a tickler for the OO tickler event when an aged open order exists.

An aged open order is:

- an order whose order header is open or held, and
- the order contains one or more order lines that are open or held, and
- the order line is not reserved (Quantity reserved is 0) or is reserved but not printed (Quantity reserved is greater than 0 and Quantity printed is 0), and
- the order is older than a specified number of days, based on entered date or arrival date defined for the order lines on the order.

One tickler is created for each ship to customer on an aged open order that qualifies for an OO event rule; if an aged open order qualifies for more than 1 event rule, the system creates 1 tickler for the first event rule, in processing sequence order, that qualifies.

**Note:**

The system does not allow multiple ticklers for the OO event (the Allow multiple ticklers field must be unselected).

When is the OO event evaluated? The system evaluates the OO event when you run the Evaluate Create/Resolve Tickler periodic function (program name PFR0072).

Graduating OO ticklers: Each time you run the Evaluate Create/Resolve Tickler periodic function, the system determines if any existing OO ticklers should be graduated.

- If an OO tickler exists for an aged open order and the aged open order qualifies for a new event rule, based on processing sequence order, the system keeps the existing tickler open and applies the new event rule to the tickler.
- If an OO tickler exists for an aged open order and the aged open order qualifies for the event rule currently assigned to the existing tickler, the system does not create a new tickler and keeps the existing tickler without any updates.
- If an OO tickler exists for an aged open order and the aged open order no longer qualifies for the current event rule and does not qualify for any other OO event rules, the system resolves the tickler; see [Resolving OO Ticklers](#).

The system updates the existing tickler with the information related to the event rule that is now associated with the tickler:

- Rule number updates to the new event rule assigned to the tickler.
- Category updates to the category for the new event rule.
- Priority updates to the priority for the new event rule.
- Assigned to updates to the assigned to user/group for the new event rule.
- Assigned date updates to the date the tickler is graduated.
- Supervisor group updates to the supervisor group for the new event rule.
- Date to notify supervisor updates, based on the new supervisor group assigned.
- Tickler procedures updates to the procedures for the new event rule.
- if the tickler was in-process, the system changes the status back to open.
- if the Notify user/group field is selected for the new event rule, the system sends a Tickler Reassignment email; see [Tickler Notification](#) for a sample email. **Note:** The system sends a Tickler Reassignment email only if the new event rule has a different assigned to user/group from the previous event rule assigned to the tickler.
- the system creates a tickler history record, indicating the tickler has been graduated from one event rule to another.

OO Event Rule Criteria

You can define the following criteria for an **OO event rule**.

The Orders older than date setting is used with all other criteria you define for an event rule. For example, if you define a ship via, the aged open order must match the specified ship

via and the order's entered/arrival date must be older than the system date by the number of days defined.



Note:

The system creates a separate tickler for each ship to order that has an order line that qualifies; the system does not create a separate tickler for each order line that qualifies.

Criterion	Event rule set up
The order line's entered date/arrival date is older than the current date by the number of days on the event rule.	Enter a date indicator code (E = entered date, A = arrival date) in the Date indicator field and enter a number in the Orders older than field. The system requires you to enter a date indicator and number of days. Note: The system evaluates the entered date/arrival date on the order detail line; the system does not evaluate the entered date/arrival date on the order header.
The ship via for the aged open order matches the ship via on the event rule.	Enter a ship via code in the Ship via field. The system evaluates the ship via on the detail line first, then the ship via on the order header. If you define a ship via for the event rule, you cannot define a ship via priority. Note: To create a tickler for each ship to order, the ship via for the ship to customer must match the ship via on the event rule.
The priority of the ship via for the aged open order matches the ship via priority on the event rule.	Enter a ship via priority number in the Ship via priority field. The system evaluates the priority of the ship via on the detail line first, then the priority of the ship via on the order header. If you define a ship via priority for the event rule, you cannot define a ship via. Note: To create a tickler for each ship to order, the priority of the ship via for the ship to customer must match the ship via priority on the event rule.

OO Event Example

The following event rules are defined for the OO event rule, in processing sequence order.

- Event rule 1: Orders older than 5 days by Arrival date and Ship via is 2
- Event rule 2: Orders older than 1 day by Arrival date and Ship via is 2

You run the Evaluate Create/Resolve Ticklers periodic function and:

- Order # 6599 qualifies for event rule 2 (an order line's arrival date is older than 1 day and the ship via is 2)
- Order # 6601 qualifies for event rule 2 (an order line's arrival date is older than 1 day and the ship via is 2)

The system creates an OO tickler for each order.

You run the Evaluate Create/Resolve Ticklers periodic function again and:

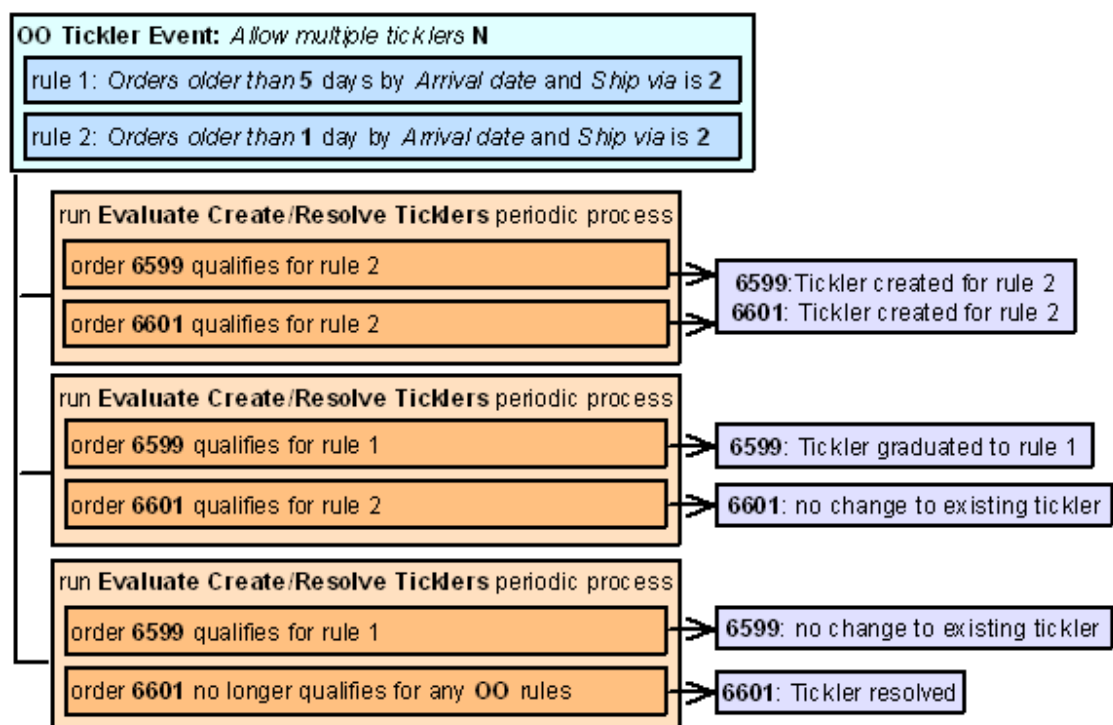
- Order # 6599 qualifies for event rule 1 (an order line's arrival date is older than 5 days and the ship via is 2)
- Order # 6601 qualifies for event rule 2 (an order line's arrival date is older than 1 day and the ship via is 2)

The system graduates the existing tickler for order # 6599 to event rule 1; the existing tickler for order # 6601 continues using rule 2.

You run the Evaluate Create/Resolve Ticklers periodic function again, and:

- order # 6599 qualifies for event rule 1 (an order line's arrival date is older than 5 days and the ship via is 2)
- order # 6601 does not qualify for any rules (a pick has been generated)

The existing tickler for order # 6599 continues using rule 1. The system resolves the existing tickler for order # 6601.



Resolving OO Ticklers

An OO tickler is resolved when you:

- select Resolve for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or [Workflow Management Screen](#).
- run the Evaluate Create/Resolve Ticklers periodic function (program name PFR0072), if the tickler no longer applies to any OO event rules. For example, the order is now cancelled.
- generate a pick slip for the order. **Note:** When you generate a pick slip for the order, the system resolves the tickler automatically and does not wait until you run the Evaluate Create/Resolve Ticklers periodic function.

SD (SVC Activation Decline) Event Processing

The system creates a tickler for the SD tickler event when a stored value card activation request receives a declined activation response from the service bureau.

The system creates a tickler for each stored value card activation request that receives a declined response.

The tickler indicates the:

- order number and ship to number associated with the stored value card
- customer number (sold to and ship to) on the order
- stored value card item number, SKU code, and description

To activate a declined stored value card: You must call the service bureau to activate the card.

When is the SD tickler event evaluated? The system evaluates the SD tickler event when the SVC_OUT job receives a stored value card activation response from the service bureau.

Allowing multiple ticklers for the SD event: The Allow multiple ticklers setting does not apply to SD ticklers.

SD event rule criteria: You cannot define event rules for the SD tickler event.

Resolving SD Ticklers

An SD tickler is resolved when you select Resolve for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or Workflow Management Screen.

For more information: See [Stored Value Card Purchase and Activation](#).

SO (Soldout Orders) Event Processing

The system creates a tickler for the SO (soldout orders) event each time an item on an order is soldout and the order qualifies for an SO event rule.

When is the SO event evaluated? The system evaluates the SO event when you or the system sell out an item during:

- order entry processing
- order maintenance processing
- batch order entry (this includes orders received via the phone order interface and ecommerce)
- [Processing Auto Soldout Cancellations \(MASO\)](#)

Quotes: The system does not evaluate the SO tickler event for a quote until you convert it to an order.

Allowing multiple ticklers for the SO event:

- If you allow multiple ticklers, the system creates multiple ticklers for an order containing soldout order lines; a separate tickler is created for each event rule whose criteria are met.
- If you do not allow multiple ticklers, the system creates only 1 tickler per order ship to that sells out an order line, for example if the system creates 1 tickler during order entry the system will not create another tickler during auto soldout cancellations.

SO Event Rule Criteria

You can define the following criteria for an SO event rule.

Hold reason: If you enter a valid hold reason in the Hold reason field, the system places the order on hold at the user level when an SO tickler is created for the event rule unless the order is in a closed status. If the order contains more than one ship to, both ship to orders are placed on hold.



Note:

The system creates a separate tickler for each ship to order that has a soldout item, regardless of the Allow multiple ticklers setting.

Criterion	Event rule set up
The order line is soldout by a batch process, such as Process Auto Soldout Cancellations, and not interactively.	Select the Batch process only field. Note: If the Batch process only field is selected, the Interactive mode field must be blank.
The order line is sold out interactively in order entry, order maintenance, or batch order entry (this includes orders received via the phone order interface and ecommerce).	Enter a mode in the Interactive mode field. E = The order line is soldout interactively in order entry or batch order entry. M = The order line is soldout interactively in order maintenance. B = The order line is soldout interactively in order entry, order maintenance, or batch order entry. Note: If you enter a value in the Interactive mode field, the Batch process only field must be unselected; this means the system creates ticklers for soldout items during the specified interactive mode and during batch processing.
The life-to-date order dollars for the sold to customer (the \$ orders LTD field in the Customer Sold To Order History table) on the order meets the life-to-date order dollars comparison on the event rule.	Enter a comparison value (valid values are GT greater than, GE greater than or equal to, LT less than, LE less than or equal to) in the Comparison field and a dollar amount in the LTD order dollars field. You can only define a whole number for the life-to-date order dollars. You can review the life-to-date order dollars for a sold to customer at the Display Customer Order History Screen .
The customer class for the sold to customer on the order matches the customer class on the event rule.	Enter a customer class in the Customer class field. Note: The system does not look at the customer class defined for the ship to customer.
The item and/or SKU on the soldout order line matches the item and/or SKU on the event rule.	Enter an item code in the Item field and optionally, a SKU code in the SKU field. If you define an item but not a SKU code and the soldout item contains SKUs, the system creates a tickler for the item if any of the SKUs for the item are soldout. If you define both an item and SKU, the system creates a tickler only if that specific SKU is soldout.
The item status for the soldout item matches the item status on the event rule.	Enter an item status in the Item status field.

Criterion	Event rule set up
The item class for the soldout item matches the item class on the event rule.	Enter an item class in the Item class field.
The ship via for the soldout order line matches the ship via on the event rule.	Enter a ship via code in the Ship via field. The system evaluates the ship via on the detail line first, then the ship via on the order header. If you enter a Ship via, you cannot define a Ship via priority for the event rule. Note: To create a tickler for each ship to order, the ship via for the ship to customer must match the ship via on the event rule
The priority of the ship via for the soldout order line matches the ship via priority on the event rule.	Enter a ship via priority number in the Ship via priority field. The system evaluates the ship via on the detail line first, then the ship via on the order header. If you enter a Ship via priority, you cannot define a Ship via for the event rule. Note: To create a tickler for each ship to order, the priority of the ship via for the ship to customer must match the ship via priority on the event rule.

SO Event Examples

Example 1: Allow multiple ticklers is unselected for the SO event.

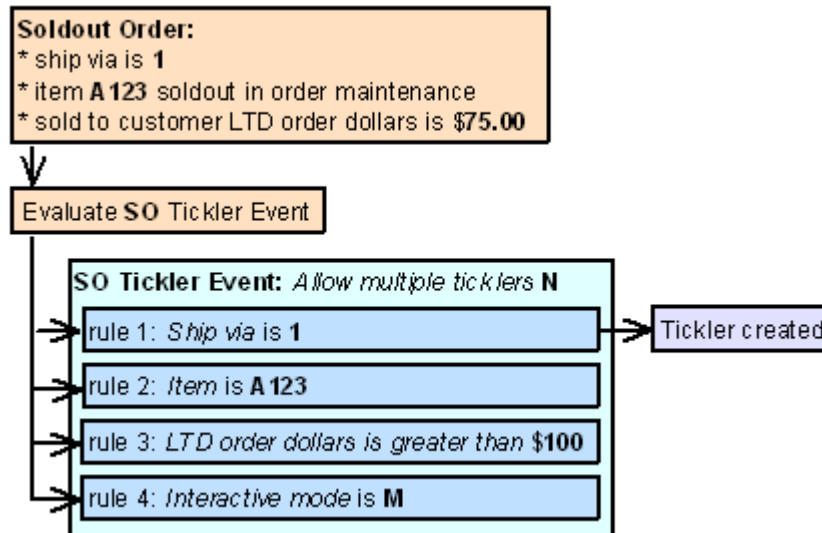
The following event rules are defined for the SO event, displayed in processing sequence order.

- Event rule 1: Ship via is 1
- Event rule 2: Item is A123
- Event rule 3: LTD order dollars is greater than \$100
- Event rule 4: Interactive mode is M (order maintenance)

You enter an order and:

- the ship via on the order header is 1.
- the item on the order is A123 and is not soldout in order entry.
- the sold to customer's life-to-date order dollars is \$75.00.
- in order maintenance, you sell out item A123.

In this scenario, the system creates 1 tickler during order maintenance for the first rule: Ship via is 1. The system does not create a tickler for the other rules whose criteria are met.



Example 2: Allow multiple ticklers is selected for the SO event.

The following event rules are defined for the SO event, displayed in processing sequence order.

- Event rule 1: Ship via is 1
- Event rule 2: Item is A123
- Event rule 3: LTD order dollars is greater than \$100
- Event rule 4: Interactive mode is M (order maintenance)

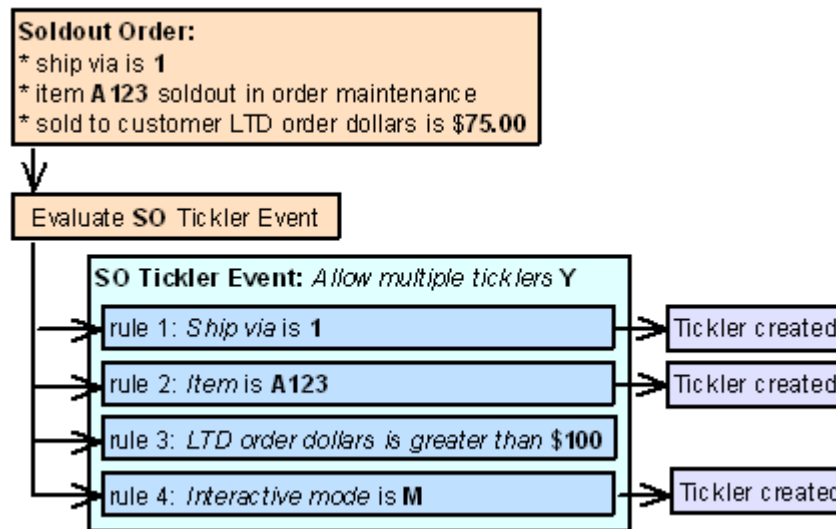
You enter an order and:

- the ship via on the order header is 1.
- the item on the order is A123 and is not soldout in order entry.
- the sold to customer's life-to-date order dollars is \$75.00.
- in order maintenance, you sell out item A123.

In this scenario, the system creates 3 ticklers during order maintenance:

- the first tickler is created for rule 1: Ship via is 1.
- the second tickler is created for rule 2: Item is A123.
- the third tickler is created for rule 4: Interactive mode is M (order maintenance).

A tickler is not created for rule 3: LTD order dollars is greater than \$100, since the sold to customer's life-to-date order dollars is less than \$100.



Resolving SO Ticklers

An SO tickler is resolved when you select Resolve for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or Workflow Management Screen.

SV (SVC Number Assignment) Event Processing

The system creates a tickler for the SV tickler event when an order containing a stored value card item is processed by billing without a number assignment. This may occur if you send a physical stored value card item to the manifesting station without first using the [Working with Physical Stored Value Card Assignment \(WPSA\)](#) menu option to assign a number to the card.

The system creates a tickler for each unit of the item that is not assigned a stored value card number.

The tickler indicates the:

- order number and ship to number associated with the stored value card
- customer number (sold to and ship to) on the order
- stored value card item number, SKU code, and description
- pick control number containing the stored value card item

If the stored value card is a physical card (SVC type P or E), you must call the customer, indicate the stored value card has not yet been activated, and ask for the number printed on the card.

If the stored value card is a virtual card (SVC type V), you must assign a number from the [Virtual Card Number Table \(FLSVCA\)](#) to the card and email this information to the recipient card holder.

When is the SV tickler event evaluated? The system evaluates the SV tickler event when an order containing a stored value card item is processed through the Billing Async.

Allowing multiple ticklers for the SV event: The Allow multiple ticklers setting does not apply to SV ticklers.

SV event rule criteria: You cannot define event rules for the SV tickler event.

Resolving SV Ticklers

An SV tickler is resolved when you select Resolve for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or [Workflow Management Screen](#).

For more information: See [Stored Value Card Purchase and Activation](#).

UP (Unconfirmed Pick Tickets) Event Processing

The system creates a tickler for the UP tickler event when a pick ticket exists that has not been confirmed.



Note:

You can use the UP event in place of printing the Carryover report.

The system considers a pick ticket unconfirmed if the pick control header status is blank (open), M (submitted to manifest), or O (carryover). If the pick ticket's status is some other value, the system does not create a tickler for the pick ticket.

One tickler is created for each unconfirmed pick ticket that qualifies for a UP event rule; if an unconfirmed pick ticket qualifies for more than 1 event rule, the system creates 1 tickler for the first event rule, in processing sequence order, that qualifies.



Note:

The system does not allow multiple ticklers for the UP event (the Allow multiple ticklers field must be unselected).

When is the UP event evaluated? The system evaluates the UP event when you run the Evaluate Create/Resolve Tickler periodic function (program name PFR0072).

Graduating UP ticklers: Each time you run the Evaluate Create/Resolve Tickler periodic function, the system determines if any existing UP ticklers should be graduated.

- If a UP tickler exists for an unconfirmed pick ticket and the unconfirmed pick ticket qualifies for a new event rule, based on processing sequence order, the system keeps the existing tickler open and applies the new event rule to the tickler.
- If a UP tickler exists for an unconfirmed pick ticket and the unconfirmed pick ticket qualifies for the event rule currently assigned to the existing tickler, the system does not create a new tickler and keeps the existing tickler without any updates.
- If a UP tickler exists for an unconfirmed pick ticket and the unconfirmed pick ticket no longer qualifies for the current event rule and does not qualify for any other UP event rules, the system resolves the tickler; see [Resolving UP Ticklers](#).

The system updates the existing tickler with the information related to the event rule that is now associated with the tickler:

- Rule number updates to the new event rule assigned to the tickler.
- Category updates to the category for the new event rule.

- Priority updates to the priority for the new event rule.
- Assigned to updates to the assigned to user/group for the new event rule.
- Assigned date updates to the date the tickler is graduated.
- Supervisor group updates to the supervisor group for the new event rule.
- Date to notify supervisor updates, based on the new supervisor group assigned.
- Tickler procedures updates to the procedures for the new event rule.
- if the tickler was in-process, the system changes the status back to open.
- if the Notify user/group field is selected for the new event rule, the system sends a Tickler Reassignment email; see [Tickler Notification](#) for a sample email. **Note:** The system sends a Tickler Reassignment email only if the new event rule has a different assigned to user/group from the previous event rule assigned to the tickler.
- the system creates a tickler history record, indicating the tickler has been graduated from one event rule to another.

UP Event Rule Criteria

You can define the following criteria for a UP event rule.



Note:

The Pick older than setting is used with all other criteria you define for an event rule. For example, if you define a pick category, the pick ticket must match the specified pick category and the pick control date for the pick ticket must be older than the system date by the number of days defined.

Criterion	Event rule set up
The Pick control date for the unconfirmed pick ticket is older than the system date by the number of days on the event rule.	Enter a number in the Picks older than field. The system requires you to enter a number of days.
The pick category defined for the pick ticket matches the pick category on the event rule.	Enter a pick category code in the Picks category field. D = The pick category for the unconfirmed pick ticket is D (drop ship pick ticket). R = The pick category for the unconfirmed pick ticket is R (regular pick ticket). S = The pick category for the unconfirmed pick ticket is S (special handling pick ticket).
The ship via for the unconfirmed pick ticket matches the ship via on the event rule.	Enter a ship via code in the Ship via field. The system evaluates the ship via on the unconfirmed pick ticket, not the ship via on the order. If you enter a ship via for the event rule, you cannot define a ship via priority.

Criterion	Event rule set up
The priority of the ship via for the unconfirmed pick ticket matches the ship via priority on the event rule.	Enter a ship via priority number in the Ship via priority field. The system evaluates the priority of the ship via on the unconfirmed pick ticket, not the ship via on the order. If you enter a ship via priority for the event rule, you cannot define a ship via.

UP Event Example

The following event rules are defined for the UP event rule, in processing sequence order.

- Event rule 1: Pick control date is 5 days for Pick category R (regular picks)
- Event rule 2: Pick control date is 1 day for Pick category R (regular picks)

You run the Evaluate Create/Resolve Ticklers periodic function and:

- Pick ticket # 69 qualifies for event rule 2
- Pick ticket # 72 qualifies for event rule 2

The system creates a UP tickler for each pick ticket.

You run the Evaluate Create/Resolve Ticklers periodic function again and:

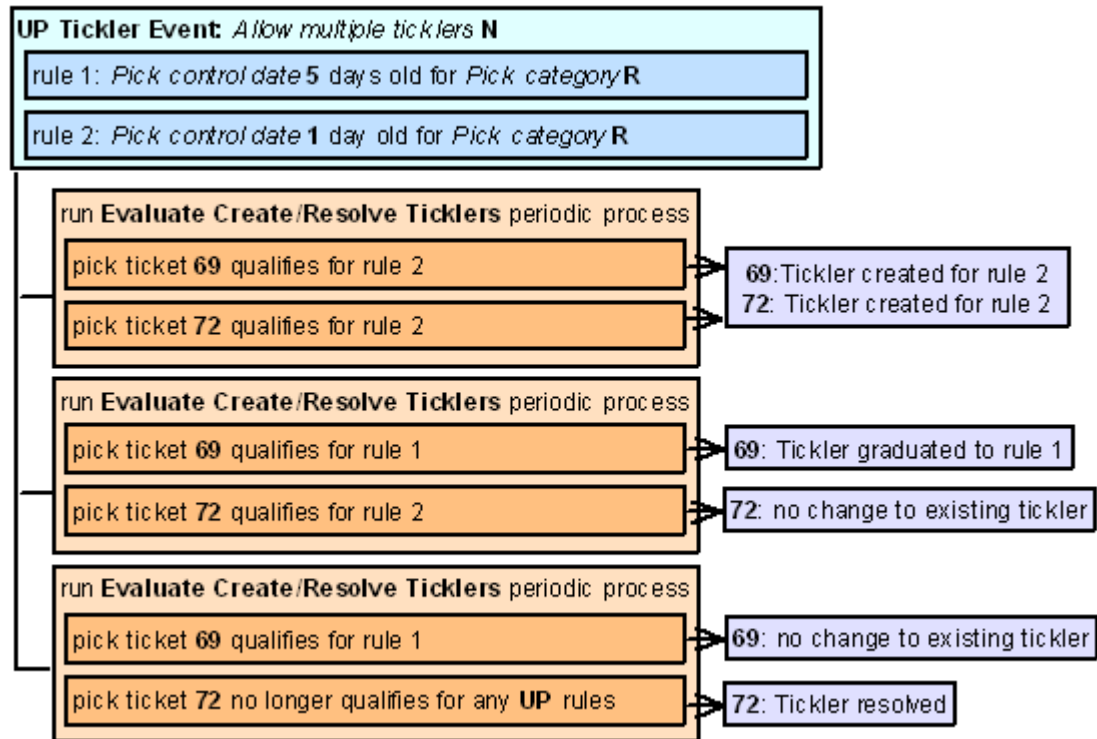
- Pick ticket # 69 qualifies for event rule 1
- Pick ticket # 72 qualifies for event rule 2

The system graduates the existing tickler for pick ticket # 69 to event rule 1; the existing tickler for pick ticket # 72 continues using rule 2.

You run the Evaluate Create/Resolve Ticklers periodic function again, and:

- pick ticket # 69 qualifies for event rule 1
- pick ticket # 72 does not qualify for any rules (the pick ticket has been confirmed)

The existing tickler for pick ticket # 69 continues using rule 1. The system resolves the existing tickler for pick ticket # 72.



Resolving UP Ticklers

A UP tickler is resolved when you:

- select Resolve for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or [Workflow Management Screen](#).
- run the Evaluate Create/Resolve Ticklers periodic function (program name PFR0072), if the tickler no longer applies to any OO event rules. For example, the pick ticket has been voided or reprinted.
- confirm the pick ticket. **Note:** When you confirm the pick ticket, the system resolves the tickler automatically and does not wait until you run the Evaluate Create/Resolve Ticklers periodic function.

VP (Voided Pick Tickets) Event Processing

The system creates a tickler for the VP tickler event when a pick ticket is voided.

When is the VP event evaluated? The system evaluates the VP event when you void a pick ticket by:

- selecting Void or Void/Unreserve for a pick ticket in the [Reprinting and Voiding Pick Slips \(WVRP or WSVP\)](#) menu option or order maintenance.
- selecting Void for a pick ticket during [Manually Confirming Shipments \(MCON\)](#).
- selecting Void All/Cancel Order in the [Reprinting and Voiding Pick Slips \(WVRP or WSVP\)](#) menu option.
- selecting Void All in order maintenance.

**Note:**

The **Void Pick Batch (WSVP)** option does not create VP ticklers.

Allowing multiple ticklers for the VP event:

- If you allow multiple ticklers, the system creates multiple ticklers for the voided pick ticket; a separate tickler is created for each event rule whose criteria are met.
- If you do not allow multiple ticklers, the system creates only 1 tickler for the voided pick ticket.

VP Event Rule Criteria

You can define the following criteria for a VP event rule.

Hold reason: If you enter a valid hold reason in the Hold reason field, the system places the order on hold at the user level when a VP tickler is created for the event rule. In this situation, the system removes any pick slip preparation from the order; see [Preparing Orders for Pick Slip Generation](#).

Criterion	Event rule set up
The ship via for the order ship to associated with the voided pick ticket matches the ship via on the event rule.	Enter a ship via code in the Ship via field. If you enter a Ship via, you cannot define a Ship via priority for the event rule. The system evaluates the ship via on the order ship to, on the ship via on the pick ticket header.
The priority of the ship via for the order ship to associated with the voided pick ticket matches the ship via priority on the event rule.	Enter a ship via priority number in the Ship via priority field. If you enter a Ship via priority, you cannot define a Ship via for the event rule. The system evaluates the ship via on the order ship to, not the ship via on the pick ticket header.
The item and/or SKU on the voided pick ticket matches the item and/or SKU on the event rule.	Enter an item code in the Item field and optionally, a SKU code in the SKU field. If you define an item but not a SKU code and the item contains SKUs, the system creates a tickler for the item if any of the SKUs for the item are on a voided pick ticket. If you define both an item and SKU, the system creates a tickler only if that specific SKU is on a voided pick ticket.

VP Event Examples

Example 1: Allow multiple ticklers is unselected for the VP event.

The following event rules are defined for the VP event, displayed in processing sequence order.

- Event rule 1: Ship via is 1
- Event rule 2: Item is A123
- Event rule 3: Item is SKU2002 RED

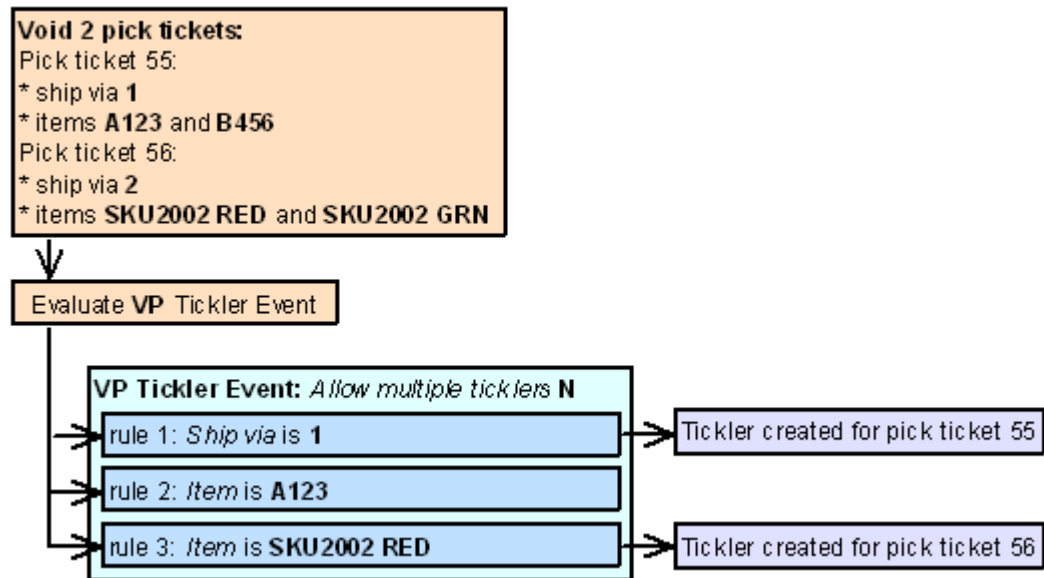
You void 2 pick tickets:

- pick ticket 55 is for ship via 1 and contains 2 pick ticket lines:
- pick ticket line 1: item A123
- pick ticket line 2: item B456
- pick ticket 56 is for ship via 2 and contains 2 pick ticket lines:
- pick ticket line 1: item SKU2002 GRN
- pick ticket line 2: item SKU2002 RED

In this scenario, the system creates:

- 1 tickler for pick ticket 55 for rule 1: Ship via is 1.
- 1 tickler for pick ticket 56 for rule 3: Item is SKU2002 RED.

The system does not create a tickler for the other rules whose criteria are met.



Example 2: Allow multiple ticklers is selected for the VP event.

The following event rules are defined for the VP event, displayed in processing sequence order.

- Event rule 1: Ship via is 1
- Event rule 2: Item is A123
- Event rule 3: Item is SKU2002 RED

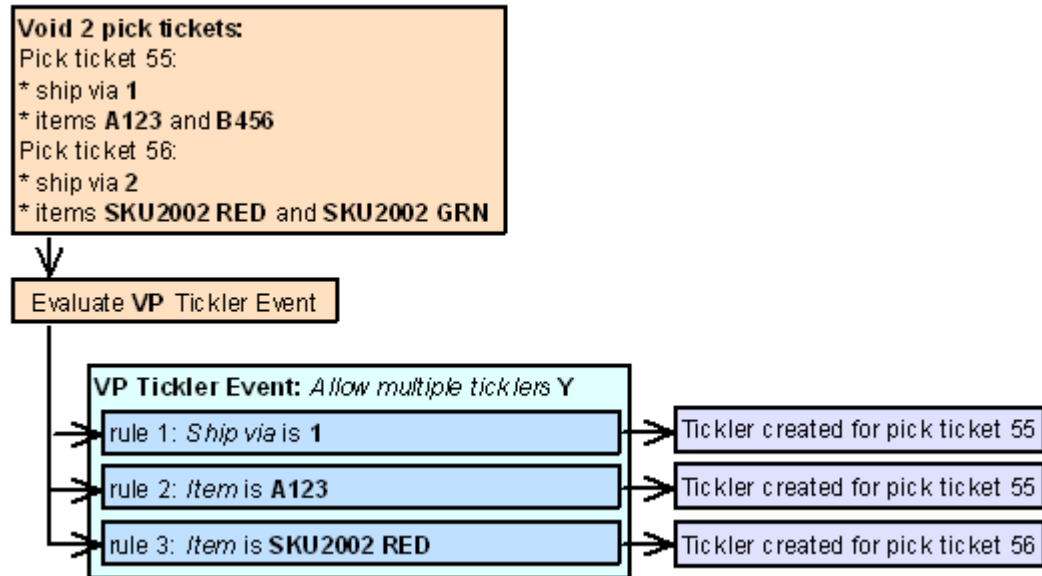
You void 2 pick tickets:

- pick ticket 55 is for ship via 1 and contains 2 pick ticket lines:
- pick ticket line 1: item A123
- pick ticket line 2: item B456
- pick ticket 56 is for ship via 2 and contains 2 pick ticket lines:
- pick ticket line 1: item SKU2002 GRN
- pick ticket line 2: item SKU2002 RED

In this scenario, the system creates:

- 2 ticklers for pick ticket 55 for rule 1: Ship via is 1 and rule 2: Item is A123.

- 1 tickler for pick ticket 56 for rule 3: Item is SKU2002 RED.



Resolving VP Ticklers

A VP tickler is resolved when you select Resolve for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or [Workflow Management Screen](#).

WF (Remote Workflow) Event Processing

The system creates a tickler for the WF tickler event when a CWWorkflow XML message is received into Order Administration from an outside source.

When is the WF event evaluated? The system evaluates the WF event when the Workflow Processing integration layer job receives the CWWorkflow XML message into Order Administration.

CWMessageIn web service: You can use the *CWMessageIn Web Service* to route CWWorkflow messages. In this situation, the target for each inbound message must match the Inbound program name for the integration layer process queue, as specified at the [Integration Layer Process Queue Screen](#).

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

Web service authentication: Use the [Working with Web Service Authentication \(WWSA\)](#) menu option to define a valid user for basic web service authentication, or client ID if using OAuth. You must also create a corresponding user profile in Oracle Identity Cloud Service and assign the user to the corresponding web service role defined for the Order Management application.

Allowing multiple ticklers for the WF event: The Allow multiple ticklers setting does not apply to the WF tickler event.

WF Event Rule Criteria

You can define the following criterion for a WF event rule.

Criterion	Event rule set up
The source of the workflow XML message received matches the message source defined for the event rule.	Enter a message source code in the Message source field. Note: The source from the CWWorkflow XML message must match the Message source for the WF event rule.

Resolving WF Ticklers

A WF tickler is resolved when you select Resolve for a tickler at the [Work with Tickler Screen \(user/group view\)](#) or [Workflow Management Screen](#).

Work with Tickler Event Rule Procedure Screen

Purpose: Use this screen to create or change the procedures, or instructions, a user should follow when working with a tickler.

How to display this screen: Select Procedures for an event rule at the [Work with Tickler Event Rule Screen](#).

Field	Description
Event	The code and description for the tickler event associated with the tickler event rule procedures. Code: Alphanumeric, 2 positions; display-only. Description: Alphanumeric, 40 positions; display-only.
Rule	The description of the event rule associated with the event rule procedures. Alphanumeric, 40 positions; display-only.
Procedure	Free-form lines where you can enter procedures, or instructions, a user should follow to resolve the tickler. Alphanumeric, 60 positions; optional.

Screen Option	Procedure
Toggle the procedure lines between add mode and change mode	Select Add/Change to toggle the procedure lines between add mode and change mode. In add mode, you can enter new procedure lines; in change mode, you can enter new procedure lines and also change existing procedure lines.

Work with Tickler Event Rule Screen

Purpose: Use this screen to create, change, and delete event rules defined for a specific tickler event. You can also create procedure notes for each event rule.



Note:

Event rules display on this screen in processing sequence order, allowing you to easily see the order in which the system evaluates the rules to determine if a tickler is created; see [Event Rule Processing Sequence](#).

How to display this screen: Select Rules for a tickler event at the [Work with Tickler Event Screen](#).

Field	Description
Event	The code and description of the event associated with the event rules. Code: Alphanumeric, 2 positions; display-only. Description: Alphanumeric, 40 positions; display-only.
Proc seq #	The processing sequence number for the event rule. The processing sequence number defines the order in which the system evaluates the rules to determine if a tickler is created, from lowest sequence number to highest. Note: The first tickler event rule that meets the criteria creates a tickler. It is important that you assign the most important tickler event rule the lowest processing sequence number. If you do not define a processing sequence number for an event rule, the system assigns the event rule a processing sequence number of 0. If all of the rules have the same processing sequence number, the system evaluates the rules in rule sequence number. See Event Rule Processing Sequence . Numeric, 3 positions; optional.
Rule seq #	The rule sequence number for the event rule. The system assigns a rule sequence number to each rule you create; the first rule you create is assigned a rule sequence number of 1, etc. Note: If all of the rules have the same processing sequence number, the system evaluates the rules to determine if a tickler is created in rule sequence number, from lowest rule number to highest. See Event Rule Processing Sequence . Numeric, 3 positions; optional.
Description	A description of the event rule, usually indicating the criteria defined for the rule. Alphanumeric, 40 positions; optional.
Pty (Priority)	The priority assigned to the event rule, used to determine the importance of ticklers created for the event rule. You can scan for ticklers by priority at the Work with Tickler Screen (user/group view) (tickler users) and Workflow Management Screen (tickler supervisors). You can assign a tickler event priority between 1-9, where 1 is the lowest priority and 9 is the highest priority. The priority defined at the tickler event level defaults, but you can override it. The tickler priority defined at the event rule level overrides the tickler priority defined at the event level. Numeric, 1 position; display-only.
Act (Active flag)	Indicates whether the event rule is active. selected = The event rule is currently active; the system creates a tickler for the event rule if its criteria are met by the system action. Remember, to create a tickler for the event rule, the Active flag at the event level must also be selected. unselected = The event rule is not currently active; the system does not create a tickler, regardless of whether the system action qualifies for the event rule. See Active Tickler Events and Rules .

Field	Description
Cat (Tickler category)	A code for the tickler category assigned to the event rule. Tickler categories are used to group ticklers. Tickler categories are defined in and validated against the Tickler Category table; see Working with Tickler Category (WTCT). Alphanumeric, 3 positions; optional.

Screen Option	Procedure
Create a tickler event rule	Select Create to advance to the Create Tickler Event Rule Screen .
Change a tickler event rule	Select Change for an event rule to advance to the Change Tickler Event Rule Screen. You can change all fields on this screen except Event code. See Create Tickler Event Rule Screen for field descriptions. Note: If you create or change a tickler event rule, you must restart the asynchronous jobs the Background Job Control menu option before your updates are applied to new ticklers.
Delete a tickler event rule	Select Delete for an event rule to delete it. Note: You can delete an event rule only if it is not associated with an open or in process tickler.
Display a tickler event rule	Select Display for an event rule to advance to the Display Tickler Event Rule Screen. You cannot change any information at this screen. See the Create Tickler Event Rule Screen for field descriptions.
Create or change tickler event rule instructions	Select Procedures for an event rule to advance to the Work with Tickler Event Rule Procedure Screen .

Change Tickler Event Screen

Purpose: Use this screen to define tickler event settings at the event level.

Important:

If you change a tickler event, you must restart the asyns in the Background Job Control menu option before your updates are applied to new ticklers.

How to display this screen: Select Change for a tickler event at the [Work with Tickler Event Screen](#).

Field	Description
Event	A code that determines the system action for which the system may create a tickler. There are 11 system actions that can create ticklers. You cannot create other tickler events for the system to evaluate for tickler creation. BO: backorders; see BO (Backorders) Event Processing CO: cancelled orders; see CO (Cancelled Orders) Event Processing HO: held orders; see HO (Held Orders) Event Processing MN: manually created; see MN (Manually Created) Event Processing NO: new orders; see NO (New Orders) Event Processing OO: aged open orders; see OO (Aged Open Orders) Event Processing SD: stored value card activation decline; see SD (SVC Activation Decline) Event Processing SO: soldout orders; see SO (Soldout Orders) Event Processing SV: stored value card number assignment; see SV (SVC Number Assignment) Event Processing UP: unconfirmed pick tickets; see UP (Unconfirmed Pick Tickets) Event Processing VP: voided pick tickets; see VP (Voided Pick Tickets) Event Processing WF: remote workflow; see WF (Remote Workflow) Event Processing Alphanumeric, 2 positions; display-only.
Description	A description of the tickler event. Alphanumeric, 40 positions; required.
Category (Tickler category)	A code for the tickler category assigned to the tickler event. Tickler categories are used to group ticklers. You can also define a tickler category for each event rule; the tickler category defined at the event rule level overrides the tickler category defined at the event level. Tickler categories are defined in and validated against the Tickler Category table; see Working with Tickler Category (WTCT). Alphanumeric, 3 positions; optional.
Resolution reason	A code for the reason why a tickler for this event is resolved. Tickler resolution reason codes are assigned to a tickler once the tickler has been resolved. You can also define a resolution reason for each event rule; the resolution reason defined at the event rule level overrides the resolution reason defined at the event level. You must define a tickler resolution reason for all tickler events except for the MN (manually created) tickler event. Tickler resolution reasons are defined in and validated against the Tickler Resolution Reason table; see Working with Tickler Resolution Reasons (WTRR). Alphanumeric, 3 positions; required except for MN tickler event.

Field	Description
Priority	The priority assigned to the tickler event, used to determine the importance of ticklers created for this event. You can assign a tickler event priority between 1-9, where 1 is the lowest priority and 9 is the highest priority. You can also define a tickler priority for each event rule; the tickler priority defined at the event rule level overrides the tickler priority defined at the event level. Numeric, 1 position; required.
Active	Indicates whether the tickler event is active. selected = The tickler event is currently active; the system creates a tickler if the system action qualifies for an event rule. unselected = The tickler event and its event rules are not currently active; the system does not create a tickler, regardless of whether the system action qualifies for an event rule. See Active Tickler Events and Rules.
Allow mult ticklers	Indicates if the system creates multiple ticklers for this tickler event if the system action qualifies for more than one event rule. selected = The system creates a tickler for each event rule whose criteria are met by the system action. unselected (default) = The system creates one tickler for the first event rule, in processing sequence order, whose criteria are met by the system action. The system does not create more than one tickler for the tickler event, regardless of whether the system action meets the criteria of more than one event rule. Multiple ticklers are not allowed for tickler events OO (aged open orders) or UP (unconfirmed pick tickets). See Allowing Multiple Ticklers.
Assign to orig user	Indicates if ticklers created for this tickler event are assigned to the user that entered the order associated with the tickler. selected = Assign ticklers created for this tickler event to the user that entered the associated order. If this field is selected, you must also enter a user ID in the Assign to user field. unselected (default) = Do not assign ticklers created for this tickler event to the user that entered the associated order; instead, assign the tickler to the specified user or tickler user group. You must also define tickler assignment for each event rule; the tickler assignment defined at the event rule level overrides the tickler assignment defined at the event level. Note: This field defaults to selected for MN (manually created) ticklers. See Tickler Assignment.

Field	Description
Notify user/group	Indicates whether the system sends a Tickler Notification email to the assigned user or to all of the users in the assigned tickler user group when a tickler is created for this tickler event. selected = Notify the assigned user/user group when a tickler is created; use the email address defined for the user in the User Extended table. If the tickler is assigned to a user group, send a notification to each user in the group, using the email address defined for each user in the User Extended table. unselected (default) = Do not notify the assigned user/user group when a tickler is created; the user can review the ticklers in his queue at the Work with Tickler Screen (user/group view). You must also define the Notify user/group setting for each event rule; the notify user/group setting at the event rule level overrides the notify user/group setting defined at the event level. See Tickler Notification for a sample Tickler Notification email.
Assign to user	The user ID of the user the system assigns ticklers to for this tickler event. You must also define the Assign to setting for each event rule; the assign to setting at the event rule level overrides the assign to setting defined at the event level. You can define either an assign to user or assign to user group for each event, but not both. Users are defined in and validated against the User table; see Working with User Records (WUSR). See Tickler Assignment. Alphanumeric, 10 positions; optional.
Assign to group	The tickler user group the system assigns ticklers to for this tickler event. You must also define the Assign to setting for each event rule; the assign to setting at the event rule level overrides the assign to setting defined at the event level. You can define either an assign to user or assign to user group for each event, but not both. The tickler user group you enter must be defined as a user type and not a supervisor type. Tickler user groups are defined in and validated against the Tickler User Group table; see Working with Tickler User Groups (WTUG). See Tickler Assignment. Alphanumeric, 10 positions; optional.
Supervisor group	The tickler supervisor group the system assigns ticklers to for this tickler event. You can also define the Supervisor group for each event rule; the supervisor group at the event rule level overrides the supervisor group defined at the event level. The tickler user group you enter must be defined as a supervisor type and not a user type. Tickler groups are defined in and validated against the Tickler User Group table; see Working with Tickler User Groups (WTUG). See Tickler Assignment. Alphanumeric, 10 positions; optional.

Field	Description
Notify supervisor	Indicates when a Supervisor Notification Count email is sent to the supervisor based on the number of days since a tickler was created. The system uses this calculation to determine the next notification date when a tickler is first created: tickler creation date + value in Number of days to notify supervisor field for the event/rule that created the tickler = next notification date. The system does not update the next notification date after a tickler is created. The system sends the email to the email address defined for the supervisor user group in the Tickler User Group table. The system continues sending an email to the supervisor group as long as a tickler assigned to the supervisor group is in an open or in process status and the Next notification date in the Tickler table is equal to or past the current date. If the next notification date is a future date, the system does not send an email until the next notification date is reached. If all ticklers assigned to the supervisor are resolved, the system no longer sends a Supervisor Notification Count email. Leave this field blank if you do not want to notify the supervisor about aging ticklers; the supervisor can review ticklers using the Workflow Management (WWFM) menu option. You can also define the Notify supervisor setting for each event rule; the notify supervisor setting at the event rule level overrides the notify supervisor setting defined at the event level. If you define a number of days in this field, you must also define the supervisor group. See Tickler Notification for a sample Supervisor Notification Count email. Numeric, 3 positions; optional.
Note type	Indicates the type of notes you enter for ticklers created for this tickler event. A = Action notes; you use the Edit Customer Actions Window to enter tickler notes. B = Bill to notes; you use the Work with Bill To Notes Screen to enter tickler notes. O = Order notes; you use the Work with Order Messages Screen to enter tickler notes. S = Sold to notes; you use the Edit Customer Notes Screen to enter tickler notes. T = Tickler notes; you use the Work with Tickler Notes Screen to enter tickler notes. You can only define the tickler work notes setting at the event level. If you change the note type for a tickler event, the system does not change the note type for previous ticklers. Alphanumeric, 1 position; required.

Tickler Event Settings

For each tickler event, you must define settings that determine how the system creates ticklers for the event. The settings you define are used as defaults for the created ticklers. You can also define settings at the event rule level. Unless otherwise noted, the settings at the event rule level override the settings at the event level.

You can define tickler event settings at the [Change Tickler Event Screen](#) and event rule settings at the [Create Tickler Event Rule Screen](#) or [Change Tickler Event Rule Screen](#).

Active Tickler Events and Rules

The Active field defines whether the system creates ticklers for the event or event rule.

- Select the Active field for a tickler event to have the system evaluate the event when the associated system action is performed. The system does not create ticklers for tickler events that are not active, regardless of whether one or more of the event's rules is active.
- Select the Active field for an event rule to have the system evaluate the event rule when the associated system action is performed. The system does not create ticklers for event rules that are not active, regardless of whether the event rule criteria are met.

If you do not want the system to create ticklers for a system action, deselect the Active field for the associated tickler event.

If you want the system to create ticklers for a system action, but do not want the system to create ticklers for a specific event rule, select the Active field for the associated tickler event and deselect the Active field for the event rule. Remember, to create a tickler for a tickler event at least one event rule must be active.

Tickler Assignment

You can define the user(s) to work with and resolve ticklers created for the tickler event and also the tickler supervisor to monitor the ticklers created for the tickler event.

The tickler assignment settings at the event rule level override the tickler assignment settings at the event level.

Tickler user: You can define the user or group of users to work with and resolve ticklers created by the tickler event.

- select the Assign to original user field to assign ticklers to the order entry operator that entered the order associated with the tickler. If you assign ticklers to the original order entry operator, you must also enter a user ID in the Assigned to user field in case the original order entry operator is no longer valid. **Note:** If the order is an ecommerce order, the system uses the user ID from the Assigned to user field.
- enter a user ID in the Assigned to user field to assign ticklers to a specific user.
- enter a tickler user group code in the Assigned to group field to assign ticklers to a specific tickler user group. You can create tickler user groups using the [Working with Tickler User Groups \(WTUG\)](#) menu option; the tickler user group type indicates if the tickler group is a user group (type U).

Tickler supervisor: Optionally, you can define the supervisor to monitor the ticklers created by the tickler event by entering a supervisor group in the Supervisor group field.

Tickler supervisors perform all the actions a tickler user performs (works with and resolves ticklers) and also monitors the ticklers assigned to his supervisor group or monitor all ticklers, regardless of the assigned supervisor. A tickler supervisor can also reassign ticklers to different users or different tickler user groups.

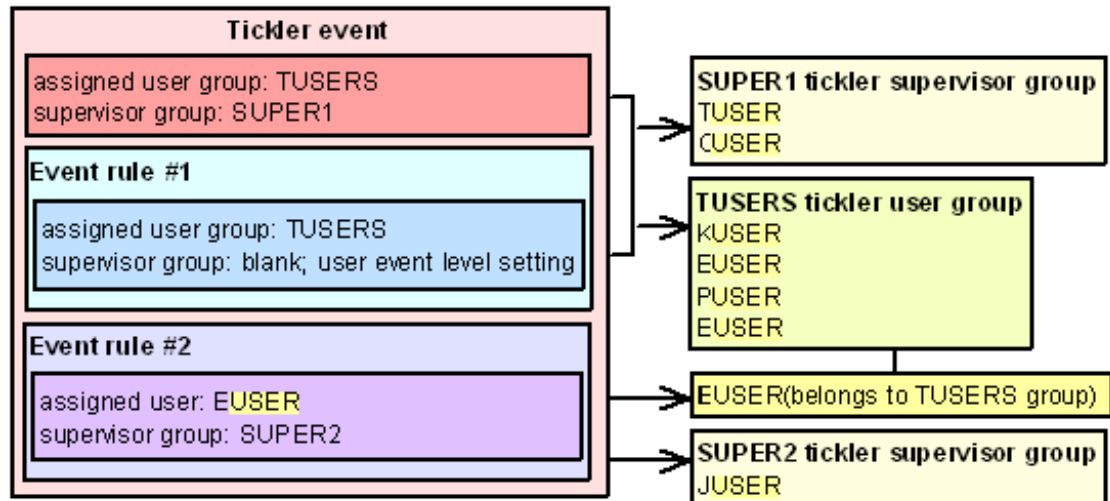
You can create supervisor groups using the Working with Tickler User Groups (WTUG) menu option; the tickler user group type indicates if the group is a supervisor group (type S).

Tickler assignment example: The flowchart below displays tickler assignment at the event level and event rule level. In this example:

- ticklers created for event rule 1 are assigned to user group TUSERS and placed in this group's work queue. Any user belonging to the TUSERS user group can work with and resolve the ticklers. Additionally, the supervisor group SUPER1 monitors the ticklers

created for event rule 1. Any user belonging to the SUPER1 supervisor group can monitor the ticklers.

- ticklers created for event rule 2 are assigned to user ERIKH and placed in his work queue. User ERIKH belongs to user group TUSERS, but other members of this group cannot work with and resolve ticklers created for event rule 2 unless user ERIKH or a supervisor reassigns the tickler. Additionally, the supervisor group SUPER2 monitors the ticklers created for event rule 2. User JANEK monitors the ticklers since she is the only user assigned to this supervisor group.



Allowing Multiple Ticklers

The Allow multiple ticklers field defines whether the system creates more than one tickler for a tickler event.

- Select this field to create a tickler for each event rule whose criteria are met by the system action.
- Deselect this field to create one tickler for the first event rule, in processing sequence order, whose criteria are met by the system action. The system does not create more than one tickler for the tickler event, regardless of whether the system action meets the criteria of more than one event rule. The Allow multiple ticklers setting must be unselected for the AR, OO, and UP tickler events.

Regardless of the Allow multiple ticklers setting:

- the system creates a separate tickler for each tickler event that qualifies. For example, if you enter an order and the order meets the criteria for a HO event rule and a SO event rule, the system creates a separate tickler for each event.
- the system does not create a tickler if a tickler already exists for the same event/order/order ship to combination. For example, if a tickler already exists for the NO tickler event, order 5988, and order ship to 1, the system does not create another tickler if you add a new order line to order 5988 for ship to 1 and it qualifies for an NO event rule.

Remember: If you allow multiple ticklers, you must think carefully before you create event rules. For example, if you create the following rules and you allow multiple ticklers, the system creates 3 ticklers, even though event rule 3 is a combination of rules 1 and 2:

- Event rule 1: Ship via is 1 (UPS)
- Event rule 2: Pay type is 1 (cash/check)
- Event rule 3: Ship via is 1 (UPS) and Pay type is 1 (cash/check)

Tickler Notification

For each tickler event, you can define whether the system sends an email when:

- a tickler is created for the event
- an existing tickler for the event is reassigned to another user or user group
- existing open or in process ticklers exist and are older than a specified number of days

Tickler Notification email: The Tickler Notification email informs the assigned to user/group that a new tickler has been created and placed in the tickler work queue. Users can review and work with ticklers assigned to them or their tickler user group using the [Working with Tickler Users/User Groups \(WTIC\)](#) menu option.

To generate: An email is generated and sent to the assigned to user or to all of the users in the assigned to user group each time the system creates a new tickler or a user manually creates a tickler and the Notify user/group field in the Tickler table is selected. The system uses the email address from the User Extended table.

The notify user/group setting at the event rule level overrides the notify user/group setting at the event level.

Email template: The format of the Tickler Notification email differs based on whether the system action that creates the tickler is an interactive process or batch process.

- If ticklers are created for an interactive process, such as order entry, the system sends an email to the assigned to user/user group for each tickler created.
- If ticklers are created for a batch process, the system sends one email to the assigned to user/user group for all of the ticklers created by the batch process. The system includes a report with the email, which displays the ticklers created by the batch process. The batch processes that create ticklers are:
 - [Processing Auto Soldout Cancellations \(MASO\)](#)
 - [Working with Credit Card Cancellations \(WCCC\)](#)
 - [Working with Backorders Pending Cancellation \(WBPC\)](#)
 - [Processing Item Substitutions \(PSUB\)](#)
- Evaluate Tickler periodic function (program name PFR0072); used to create ticklers for the OO and UP tickler events.



Note:

When you manually create a tickler and assign the tickler a future date, the system sends a Tickler Notification email when the tickler is created, not when the assigned future date is reached.

Sample email (interactive): The system generates an email similar to the sample below for all interactive system actions that create ticklers.

From: flast@EXAMPLE.COM

To: eleanorjohnson@example.com

Subject: Tickler # 000002923 CO# 555

Tickler # 000002923 ORDER LINE STATUS IS BLANK (OPEN) has been assigned to you with a date of 10/11/22.

Contents:

- From: The email address of the user that started the background async jobs.
- To: The Email address field in the User Extended table for:
 - the assigned to user.
 - the user belonging to the assigned to user group.
 - the user that entered the order associated with the tickler (the assigned to original user).
- Subject: Standard subject for tickler notification emails.
 - the tickler number is the next available number for the [Tickler Number](#) number assignment value.
 - the company number is the company where the system action occurred that created the tickler.
- Message line: Standard message notifying the user of the newly created tickler.
 - For MN ticklers, the text defined for the Short note displays after the tickler number. The date is the assigned date defined for the tickler. The text of the line differs if the tickler is assigned to you (...assigned to you...) or one of your tickler groups (...assigned to KAB...).
 - For all ticklers except MN, the description of the event rule that created the tickler displays after the tickler number. The date is the assigned date defined for the tickler. The text of this line differs if the tickler is assigned to you (...assigned to you...) or one of your tickler groups (...assigned to KAB...).

Sample email (batch): The system generates an email similar to the sample below for batch processes that create ticklers.

From: flast&EXAMPLE.COM

To: eleanorjohnson@example.com

Subject: XXREPORT.TXT

Sold Out Orders Report Count for CO# 555 for KAB is 4. Please see attached report for more information.

Contents:

- From: The email address of the user that started the background async jobs.
- To: The Email address field in the User Extended table for:
 - the assigned to user.
 - the user belonging to the assigned to user group.
 - the user that entered the order associated with the tickler (the assigned to original user).
- Subject: Standard subject for tickler notification batch emails, where XX is the tickler event code.
- Message line: Standard message notifying the user of the newly created ticklers, displaying:
 - the name of the process that created the ticklers, for example Sold Out Orders.

- the user ID or tickler group assigned to the ticklers.
- the number of ticklers created.

Tickler Notification batch report: The report sorts in event, user/user group, created date, tickler number sequence.

The name of the report is based on the batch process that created the ticklers:

- Backorders Report displays for newly created BO ticklers.
- Cancelled Orders Report displays for newly created CO ticklers.
- Aged Open Orders Report displays for newly created OO ticklers.
- Sold Out Orders Report displays for newly created SO ticklers.
- Unconfirmed Picks Report displays for newly created UP ticklers.

10/15/02 12:02:15 KAB Co. **Sold Out Orders Report** for KAB

Event: SOLD OUT ORDERS

User: KBROWN

Created Assigned Tickler# Sts Evnt Cat Rule Description/Note

10/15/02 10/15/02 3132 O SO SO 001 BATCH PROCESS ONLY IS Y

Order#	Sts	Customer#	Name/Email	Telephone#
6270 - 001	X	6	PAWS AND CLAWS PET SUPPLIES ATTN: LAST pawsandclaws@example.net	508 555-0100

10/15/02 10/15/02 3133 O SO SO 002 INTERACTIVE MODE IS M

Order#	Sts	Customer#	Name/Email	Telephone#
6270 - 001	X	11	NONNIE, NONA nnonnie@example.net	978 555-0101

10/15/02 10/15/02 3134 O SO SO 003 ITEM IS BLUEBERRY

Order#	Sts	Customer#	Name/Email	Telephone#
6270 - 001	X	16	LAST, FIRST bmiranda@example.net	508 555-0102

Total ticklers for event SO 3

Total ticklers 3

- **Contents:**
- Event: The description of the tickler event associated with the ticklers created by the batch process.
- User/user group: The user or tickler group assigned to the newly created ticklers.
- Created: The date the tickler was created.

- **Assigned:** The date the tickler was assigned to the current user/tickler user group; the assigned date is the same date as the created date.
- **Tickler#:** The newly created tickler number.
- **Status:** The status of the tickler; when a tickler is first created, the status is O (open).
- **Event:** the code for the tickler event associated with the newly created tickler.
- **Category:** The tickler category assigned to the tickler.
- **Rule:** The event rule that created the tickler.
- **Description:** A description of the event rule that created the tickler.
- **Order#:** The order associated with the tickler.
- **Status:** The status of the order associated with the tickler.
- **Customer#:** The sold to customer associated with the tickler. If this email is for the AR tickler event, the bill to customer associated with the tickler displays.
- **Name:** The sold to customer associated with the tickler.
- **Email:** The primary email address defined for the sold to customer.
- **Telephone:** The telephone number defined for the sold to customer.
- **Total ticklers for event:** The total number of newly created ticklers for the tickler event.
- **Total ticklers:** The total number of newly created ticklers across all tickler events.

Tickler Reassignment email: The system sends an email each time an existing tickler is reassigned to a new user or tickler user group.



Note:

The system sends a Tickler Reassignment email only if the Notify user/group field for the event rule associated with the tickler is selected.

To generate: An email is generated when an existing tickler is:

- reassigned to a new user or tickler user group. A tickler user can reassign ticklers currently assigned to him at the [Change Tickler Screen](#); a tickler supervisor can reassign ticklers, regardless of who is currently assigned, at the Change Tickler screen or [Reassign Ticklers Window](#).
- graduated to a new event rule; only ticklers for the AR, OO, and UP events are graduated. The system sends a Tickler Notification Reassignment email only if the new event rule has a different assigned to user/group from the previous event rule assigned to the tickler.

From: flast&EXAMPLE.EXAMPLE.COM

To: eleanorjohnson@example.com

Subject: Tickler # 000002923 CO# 555 (REASSIGNED)

Tickler# 7159 OLDER THAN 5 DAYS (ARRIVAL0, SHIP VIA 2 has been assigned to KAB with a date of 10/14/02.

Contents:

- **From:** The email address of the user that started the background async jobs.

- To: The Email address field in the User Extended table for:
 - the new assigned to user.
 - the user belonging to the new assigned to user group.
- Subject: Standard subject for tickler reassignment emails.
 - The tickler number is the number of the tickler that has been reassigned.
 - the company number is the company where the system action occurred that created the tickler.
- Message line 1: Standard message notifying the user of the reassigned tickler.
 - For MN ticklers, the text defined for the Short note displays after the tickler number. The date is the assigned date defined for the tickler. The text of the line differs if the tickler is assigned to you (...assigned to you...) or one of your tickler groups (...assigned to KAB...).
 - For all ticklers except MN, the description of the event rule defined for the tickler displays after the tickler number. The date is the assigned date defined for the tickler. The text of this line differs if the tickler is assigned to you (...assigned to you...) or one of your tickler groups (...assigned to KAB...).

Supervisor Notification Count email: The Supervisor Notification Count email informs the users in the tickler supervisor group that open and in process ticklers exist that are assigned to the supervisor group and have not yet been resolved. The email includes a report which displays the number of open ticklers assigned to the supervisor group that have not yet been resolved. The tickler supervisor can use the report to determine if he should reassign ticklers based on the current workload of users assigned to work with and resolve the ticklers.

To generate: An email is generated and sent to all of the users in the supervisor group when you run the Evaluate Tickler periodic function if:

- an open or in process tickler exists, and
- the tickler is assigned to a supervisor group, and
- the Next notification date defined for the tickler in the Tickler table is equal to or past the current date.

The system sends an email to the email address defined for the supervisor user group in the Tickler User Group table.



Note:

If a user belongs to more than one tickler supervisor group, that user will receive a separate Supervisor Notification Count email for each tickler supervisor group that has aged ticklers.

The supervisor setting at the event rule level overrides the supervisor setting at the event level.

Once an initial Supervisor Notification Count email is sent to the supervisor group, the system sends an email each time you run the Evaluate Tickler periodic function.

- When the system creates a tickler, the system calculates the date when the supervisor should be notified and updates the Next notification date field in the Tickler table with the initial notice date. The system uses this calculation to determine the next notification date when a tickler is first created: tickler creation date + value in Number of days to notify supervisor field for the event rule that created the tickler = next notify date.

- Once an initial Supervisor Notification Count email is sent to the supervisor, the system sends an email to the supervisor group each time you run the Evaluate Tickler periodic function since the next notification date is past the current date. The system does not update the next notification date once an initial email is sent to the supervisor.

 Note:

The system does not use the Notify user/group setting defined for the event to determine if a Supervisor Notification Count email is sent to the supervisor.

The system continues sending an email to the supervisor as long as a tickler assigned to the supervisor group is in an open or in process status and the Next notification date is equal to or past the current date. If all ticklers assigned to the supervisor are resolved, the system no longer sends a Supervisor Notification Count email.

Sample email:

From: flast&EXAMPLE.COM

To: eleanor.johnson@example.com

Subject: SUPERVSR.TXT

Supervisor Notification Count for CO# 555 for HOSUPER is 55. Please see attached report for more information.

Contents:

- From: The email address of the user that started the background async jobs.
- To: The email address defined for the supervisor user group in the Tickler User Group table.
- Subject: Standard subject for supervisor notification count emails.
- Message line: Standard message notifying the supervisor of the supervisor notification count. The tickler count is the number of ticklers in an open or in process status that are assigned to the supervisor group and the next notification date for the tickler in the Tickler table is equal to or past the current date.

Supervisor Notification report: The Supervisor Notification report breaks by event and within event by user/user group. The report sorts in event, user/user group, created date, tickler number sequence. A total displays for each event and across all events.

10/15/02 8:11:11 KAB Co. Supervisor Notification for SUPERKAB

Event: HELD ORDERS

User: KAB

Created	Assigned	Tickler#	Sts	Evnt	Cat	Rule	Description/Note
9/18/02	10/15/02	3060	O	HO	HO	001	ORDER HOLD REASON IS AT
Order#	Sts	Customer#	Name/Email	Telephone#			
6261 - 001	H	11	LAST, FIRST	5085550103			
flast@example.com							

Total ticklers for event HO 1

Event: BACKORDERS

User: DDICESARE

Created Assigned Tickler# Sts Evnt Cat Rule Description/Note

9/28/02 10/15/02 3263 O BO BO 003 ITEM IS AB10000

Order#	Sts	Customer#	Name/Email	Telephone#
6781 - 001	H	19	LAST, FIRST flast@example.com	9785550103

Total ticklers for event BO 1

Total ticklers 2

Contents:

- Supervisor group: The name of the supervisor group assigned to the open or in process ticklers.
- Event: The description of the tickler event associated with open or in process ticklers.
- User/user group: The user or tickler group assigned to open or in process ticklers for the event.
- Created: The date the tickler was created.
- Assigned: The date the tickler was assigned to the current user/tickler user group.
- Tickler #: The tickler number that is open or in process.
- Status: The status of the tickler; O (open) or I (in process).
- Event: The code for the tickler event associated with the tickler.
- Category: The tickler category assigned to the tickler.
- Rule: The event rule that created the tickler.
- Description/Note:
 - For MN ticklers: the text from the Short note field displays. If the Short note field for the tickler is blank, the description of the MN event displays.
 - For all ticklers except MN: the description of the event rule displays.
- Order#: The order and ship to associated with the tickler.
- Status: The status of the order.
- Customer#: The sold to customer associated with the tickler.
- Name: The name of the sold to customer.
- Email: The primary email address defined for the sold to customer.
- Telephone#: The telephone number defined for the sold to customer.
- Total ticklers for event: The number of open or in process ticklers assigned to the supervisor group for the tickler event.
- Total ticklers: The number of open or in process ticklers assigned to the supervisor group across all tickler events

Tickler Work Notes

The Note type field defines the type of tickler work notes a user enters for each tickler event; these work notes describe resolution notes and progress notes.

- A = Action notes; the user enters tickler work notes at the [Edit Customer Actions Window](#).
- B = Bill to notes; the user enters tickler work notes at the [Work with Bill To Notes Screen](#).
- O = Order notes; the user enters tickler work notes at the [Work with Order Messages Screen](#).
- S = Sold to notes; the user enters tickler work notes at the [Edit Customer Notes Screen](#).
- T = Tickler notes; the user enters tickler work notes at the [Work with Tickler Notes Screen](#).

You can only define the tickler work notes setting at the event level. If you change the note type setting, the system does not change the note type for previously created ticklers.

Tickler Priority

The tickler priority defines the importance of ticklers created for the tickler event; you can scan for ticklers by priority at the [Work with Tickler Screen \(user/group view\)](#) (tickler users) and [Workflow Management Screen](#) (tickler supervisors).

You can assign a tickler priority between 1-9, where 1 is the lowest priority and 9 is the highest priority.

The tickler priority defined at the event rule level overrides the tickler priority defined at the event level.

Tickler Category

Optionally, if you wish to group ticklers, you can assign a tickler category to ticklers.

You can scan for ticklers assigned to this category at the [Work with Tickler Screen \(user/group view\)](#) (tickler users) and [Workflow Management Screen](#) (tickler supervisors).

Example: To view only ticklers created for a specific HO rule, create a tickler category for each HO rule you create. This way you can view all ticklers created for HO rule 1 (paytype hold reason is AT) versus ticklers created for HO rule 2 (order hold reason is SF). In this example, tickler category for rule 1 may be HAT and tickler category for rule 2 may be HSF.

The tickler category defined at the event rule level overrides the tickler category defined at the event level.

You can create tickler categories using the [Working with Tickler Category \(WTCT\)](#) menu option.

Tickler Resolution Reason

Tickler resolution reasons are required when you or the system resolves a tickler; the resolution reason indicates the reason why the tickler is resolved.

You can define a tickler resolution reason for a tickler event or event rule; when the system creates a tickler for the tickler event/rule, the system updates the Resolution reason field in the Tickler table.

It is recommended you create at least 2 ticklers resolution reasons: one reason to use when the system resolves the tickler, and one reason to use when you manually resolve a tickler.

The resolution reason defined at the event rule level overrides the resolution reason defined at the event level.

You can create tickler resolution reasons using the [Working with Tickler Resolution Reasons \(WTRR\)](#) menu option

Point of Sale Integration

Topics in this part: This part describes integration between Order Administration and a POS (point of sale) system.

- [Point of Sale Integration Overview](#) provides a brief overview of the various integrations available.
- *Generic Inventory Transaction Upload* describes the process of uploading inventory transactions.
- *Generic Item Download API* describes the process of downloading item/SKUs.
- *Generic Vendor Download API* describes the process of downloading vendors.
- *Generic Invoice Download API* describes the process of downloading invoices.
- [Working with Outbound Interface Transactions \(WOIT\)](#) allows you to review triggers in the IL Outbound Trigger table.
- [Generating Outbound Interface Triggers \(GOIT\)](#) describes how to create triggers in the IL Outbound Trigger table for item/SKUs, vendors, and/or invoices.
- *Generic Customer History API* describes how the system responds to requests for customer or order history information.
- *Generic Inventory Inquiry API* describes how the system responds to requests for inventory information about an item/SKU.
- *Generic Inventory Download API* describes the process of downloading item availability information.
- *Generic Customer Inquiry (Search) API* describes how the system responds to requests for customer records based on various search criteria.
- [Work with Store Cross Reference \(WSCR\)](#) describes how to set up a cross reference table to map store locations between Order Administration and an external system such as Order Orchestration or a POS application.
- [Store Upload](#) explains how to upload store cross reference information from an external system to create or update records the Store Cross Reference table.
- *Generic Customer Download API* describes the process of downloading customer information.
- *Mass Customer Download* describes the process of creating a batch file containing customer information for sold to customers that meet the Mass Customer Download customer class criterion. Note that this option is not currently implemented.
- [Customer Engagement Batch Customer and Sales Integration](#) describes the process of sending customer, item, sales and return information from Order Administration to Oracle Retail Customer Engagement.

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

Point of Sale Integration Overview

Purpose: The point of sale integration allows you to send data from Order Administration to your point of sale system and receive data from your point of sale system into Order Administration.

In this topic:

- [Point of Sale Download Processing](#)
 - [What Data Can I Download?](#)
 - [When are Download Triggers Created?](#)
 - [Identifying Download Triggers](#)
 - [Outbound Interface Trigger Rules](#)
 - [Outbound Interface Trigger Monitor](#)
 - [Trigger Cleanup](#)
 - [Processing Delete Triggers](#)
 - [Outbound Interface Message Builder](#)
 - [Outbound Interface Queues](#)
 - [Generic Download Message Formatting](#)
- [Point of Sale Upload Processing](#)
 - [Generic Order Interface](#)
 - [Inventory Transaction Upload](#)
- [Point of Sale Bi-Directional Processing](#)
 - [Customer Inquiry \(Search\) Integration](#)
 - [Customer History Integration](#)
 - [Inventory Inquiry Integration](#)
- [Point of Sale Integration Setup](#)
 - [System Control Values](#)
 - [Menu Options](#)
 - [Periodic Functions](#)

Point of Sale Download Processing

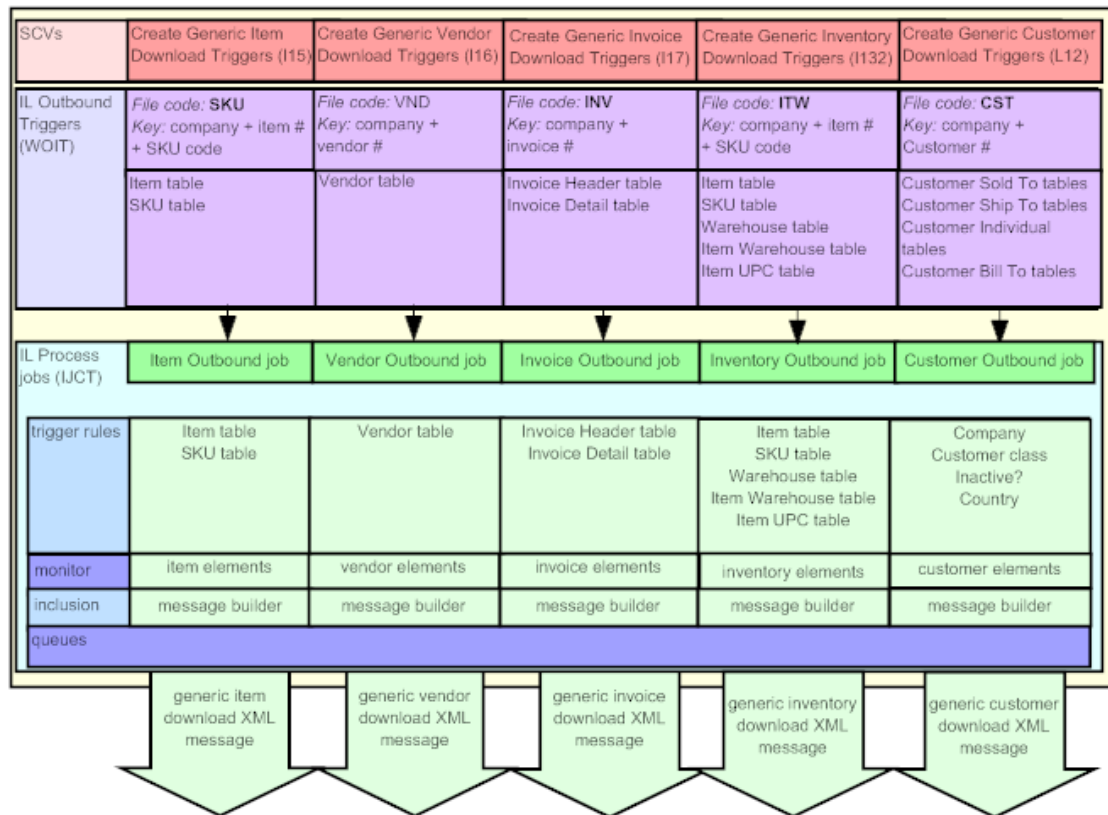
Overview: Order Administration allows you to capture the following information to download to a point of sale system:

- item/SKUs; see *Generic Item Download API*
- vendors; see *Generic Vendor Download API*
- invoices; see *Generic Invoice Download API*
- inventory; see *Generic Inventory Download API*
- customers; see *Generic Customer Download API*

For information on the above referenced APIs, see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

Information flow: This flowchart explains how information is downloaded from Order Administration to a point of sale system.

OACS



What Data Can I Download?

Jobs in the [Working with Integration Layer Processes \(IJCT\)](#) menu option control what information is downloaded to another system:

- Item Outbound job: generates an item download XML message for each trigger in the IL Outbound table with a File code of SKU.
- Vendor Outbound job: generates a vendor download XML message for each trigger in the IL Outbound table with a File code of VND.
- Invoice Outbound job: generates an invoice download XML message for each trigger in the IL Outbound table with a File code of IHD.
- Inventory Outbound job: generates an inventory download XML message for each trigger in the IL Outbound table with a File code of ITW.
- Customer Download job: generates a customer download XML message for each trigger in the IL Outbound table with a File code of CST.

When are Download Triggers Created?

System control values control the type of data downloaded to a point of sale system.

- If the system control value is selected, certain actions in Order Administration triggers the system to create triggers in the IL Outbound Trigger table. The IL Outbound Trigger table acts as a “to do” list for the data that requires download.

- If the system control value is unselected, the system does not create triggers in the IL Outbound Trigger table.

You can also create triggers for existing data in your company using the [Generating Outbound Interface Triggers \(GOIT\)](#) menu option.

System Control Value	Description
Create Generic Item Download Trigger Records (I15)	Select this field to create item download triggers in the IL Outbound Trigger table to download to the point of sale system.
Create Generic Vendor Download Trigger Records (I16)	Select this field to create vendor download triggers in the IL Outbound Trigger table to download to the point of sale system.
Create Generic Invoice Download Trigger Records (I17)	Select this field to create invoice download triggers in the IL Outbound Trigger table to download to the point of sale system.
Create Generic Inventory Download Triggers (I32)	Select this field to create inventory download triggers in the IL Outbound Trigger table to download to the point of sale system.
dCreate Generic Customer Download Triggers (L12)	Select this field to create customer download triggers in the IL Outbound Trigger table to download to the point of sale system.

Identifying Download Triggers

Each trigger in the IL Outbound Trigger table has a:

- File code: indicating the type of information to download and which IL process job processes the trigger.
- Key: indicating the specific record to download.
- Capture type: indicating the type of activity performed against the record:
 - A = the record was created.
 - C = the record was maintained. **Note:** The system removes any duplicate change triggers; see [Trigger Cleanup](#).
 - D = the record was deleted. **Note:** The system processes delete triggers immediately; see [Processing Delete Triggers](#).

You can review point of sale download triggers in the [Working with Outbound Interface Transactions \(WOIT\)](#) menu option.

File code	Created when	Refers to table(s)	Key	IL Process job
SKU	An item/SKU is added, updated or deleted; see <i>Item Outbound Trigger Activities</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Item SKU	11122222222222222222 23333333333333333333 3 where: 111 is the company code 22222222222222222222 is the item number 33333333333333333333 is the SKU code	Item Outbound

File code	Created when	Refers to table(s)	Key	IL Process job
IHD	An invoice is created or updated; see <i>Invoice Outbound Trigger Activities</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Invoice Header Order Header	11122222223333 3333 where: 111 is the company code 2222222 is the order number 33333333 is the invoice number	Invoice Outbound
VND	A vendor is added, updated or deleted; see <i>Vendor Outbound Trigger Activities</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Vendor	1112222222 where: 111 is the company code 2222222 is the vendor code	Vendor Outbound
ITW	Item/SKU available quantity changes; see <i>Creating Inventory Download Triggers Interactively Due to Changes in Availability</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Item SKU Warehouse Item Warehouse Item UPC	11122222222222 23333333333333 3 where: 111 is the company code 222222222222 is the item number 33333333333333 is the SKU code	Inventory Outbound
CST	You create, change, or delete a customer; see <i>Customer Outbound Trigger Activities</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Customer Sold To tables Customer Ship To tables Customer Bill To tables	1112222222 where: 111 is the company code 2222222 is the customer code	Customer Download Outbound

Outbound Interface Trigger Rules

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

See [Defining Outbound Interface Trigger Rules](#) for more information on setting up trigger rules for each IL Process job.

For IL Process job:	you can create trigger rules for:	Example:
Item Outbound	Item table SKU table	You can specify to only create item download triggers for company 555, items that are SKU'ed and whose SKUs are located in warehouse 20. To do this: • in the Item table trigger rules, enter EQ and 555 next to the Company trigger field and EQ and 'Y' next to the Allow SKU's trigger field. • In the SKU table trigger rules, enter EQ and 20 next to the Warehouse trigger field. See <i>Item Outbound Trigger Rules</i> in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Invoice Outbound	Invoice Header table Order Header table	You can specify to only create invoice download triggers for debit invoices and not credit invoices. To do this, enter EQ and I (invoice) next to the Invoice type trigger field. See <i>Invoice Outbound Trigger Rules</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Vendor Outbound	Vendor table	You can specify to only create vendor download triggers for companies 27 and 555 and vendor 202. To do this, enter LIST and 27 555 next to the Company trigger field and EQ and 202 next to the Vendor # trigger field. See <i>Vendor Outbound Trigger Rules</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Inventory Outbound	Item SKU Warehouse Item Warehouse Item UPC	You can specify not to create inventory download triggers for non-inventory items. To do this, enter NE and 'Y' next to the Non-inventory trigger field.
Customer Download Outbound	Company Customer class Inactive? Country	You can specify not to create customer download triggers for inactive customers. To do this, enter NE and 'Y' next to the Inactive? trigger field. See <i>Customer Outbound Trigger Rules</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Outbound Interface Trigger Monitor

When active, each IL Outbound job monitors the IL Outbound Trigger table for unprocessed triggers at defined intervals, based on the Outbound delay time.

Each IL Outbound job:

- looks for triggers with the appropriate File code and a Status of ready (R).
 - the Item Outbound job looks for File code SKU.
 - the Invoice Outbound job looks for File code IHD.
 - the Vendor Outbound job looks for File code VND.
 - the Inventory Outbound job looks for File code ITW.
 - the Customer Download Outbound job looks for File code CST.
- sends each trigger to the IL Outbound message builder to generate an XML message.

Trigger Cleanup

Before processing triggers in the IL Outbound table, the system looks for duplicate unprocessed download triggers with the same Capture type for the same File code and Key. If duplicate triggers exist, the system removes the duplicates, leaving only the most recent trigger for the Capture type, File code and Key.

Example: The following change triggers exist in the IL Outbound table.

File	Status	Key	Results
SKU	unprocessed	555AB105004 RED GRLS SMLL	The system deletes 2 of these triggers, leaving only one trigger to process.
SKU	unprocessed	555AB105004 RED GRLS SMLL	
SKU	unprocessed	555AB105004 RED GRLS SMLL	



Note:

If both an add and change trigger exist for the same File code and Key, the system generates a download message for both triggers.

Processing Delete Triggers

The system processes triggers in the IL Outbound Trigger table with a delete (D) Capture type immediately, regardless if the IL Outbound job is active or inactive.



Note:

Since you cannot delete an invoice, the system never creates a delete download trigger for an invoice.

If one or more unprocessed triggers exist in the IL Outbound Trigger table for the same File code and Key, the system:

- if one of the matching triggers is an add (A) Capture type: does not create the delete trigger and removes any other matching triggers (add and change). Since the point of sale system never received the add trigger, you do not want to send a delete trigger or any other triggers.

 Note:

However, if an Original processed date and time exist for the add trigger (indicating the trigger was previously downloaded and then reset to reprocess again), the system generates a download message for the delete trigger and removes any other matching triggers (add and change). Since the point of sale system previously received the add trigger, you want to send a delete notification to the system.

- if the matching trigger is a change (C) Capture type: generates a download message for the delete trigger and removes any other matching change triggers. Since the point of sale system is receiving a delete trigger, you do not need to send any change triggers.

Outbound Interface Message Builder

For each trigger, the IL Outbound message builder:

- determines what information requires download. The system uses the Key field for the trigger to determine which records require download.
 - The Key field for item download triggers consists of company + item number + SKU code. The SKU code is included only if the item is a SKU'ed item. For example the Key 555AB100112 BLUE GRSL SMLL indicates the item and SKU information is located in company 555 for item number AB100112 and SKU code BLUE GRSL SMLL.
 - The Key field for invoice download triggers consists of company + order number + invoice number. For example the Key 55500049680000583 indicates the invoice information is located in company 555 for order number 4968 and invoice number 583.
 - The Key field for vendor download triggers consists of company + vendor number. For example the Key 5550002006 indicates the vendor information is located in company 555 for vendor number 2006.
 - The Key field for inventory download triggers consists of company + item number + SKU code. The SKU code is included only if the item is a SKU'ed item. See the description of the item download trigger key above.
- determines which elements to include in the download message, based on XML inclusion rules. You can define XML inclusion rules for each IL Outbound job at the [Outbound Interface XML Inclusion Screen](#). XML inclusion defines which elements to include in a download message.
 - If the element is included, that element and its parents are included in the generated download XML message.
 - If the element is excluded, that element and its children are excluded from the generated download message.
- sends the generated download message to the queues defined for the Outbound job that are active.

For more information:

- item download: *Item Outbound XML Inclusion*
- vendor download: *Vendor Outbound XML Inclusion*
- invoice download: *Invoice Outbound XML Inclusion*
- inventory download: *Inventory Download XML Inclusion*

- customer download: *Customer Outbound XML Inclusion*

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

Outbound Interface Queues

Once the Outbound message builder determines which elements to include in the download XML message, the IL Outbound job sends each download XML message to the appropriate queues whose Enabled field is selected. If the queue is not enabled, the system does not send the download message to that queue.

You can define outbound queues for each IL Outbound job at the [Work with Integration Layer Process Queues Screen](#).

For example, you can define a separate queue to send the download message to your:

- retail store
- warehouse management system

Generic Download Message Formatting

For each download message:

- numeric fields are not zero-filled, for example 000001 displays as 1.
- blank spaces are removed from the beginning and end of alphanumeric fields.
- decimal places for numeric fields are implied.
- empty elements are not included; for example, if an item/SKU does not have a vendor item defined, the system does not send the VendorItem element or its children (VITPriceBreak, VITAdditionalCharge, VITNote, and VITUserField) in the item download message.
- empty attributes are not included; for example, if the Kit type field for an item/SKU is blank, the system does not send the Kit_type attribute in the item download message.

For more information:

- *Item Download XML Message (CWIItemOut)*
- *Vendor Download XML Message (CWVendorOut)*
- *Invoice Download XML Message (CWInvoiceOut)*
- *Inventory Download XML Message (CWInventoryDownload)*
- *Customer Download XML Message (CWCustomerDownload)*

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

Point of Sale Upload Processing

The following uploads allow you to bring information into Order Administration from another system.

Generic Order Interface

Overview: Use the generic order interface to send orders into Order Administration. You can use this interface for any type of order, including retail point of sale transactions, orders received through a remote call center, and orders taken at a web storefront.

Options: Your options through the generic order interface include:

- response: generating a detailed response, a simple response, or no response
- separate payment message: sending the payment information separately or in the same message as the rest of the order information
- batching: batched or non-batched orders
- deposit and refund suppression: suppressing the order from deposit processing and refund generation
- returns: entering a return by specifying a negative order quantity
- customer updates: updating an existing sold-to, or creates a new sold-to, bill-to, or permanent ship-to customer

For more information: See the *Generic Order Interface (Order API)* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1)

Inventory Transaction Upload

Overview: You can use the *Generic Inventory Transaction Upload* to synchronize inventory levels in Order Administration with another system. For example, you can upload counts in retail stores. To do so, you can identify each store as a warehouse in Order Administration. The inventory counts of each store are then available for review through a menu option such as [Using Inventory Inquiry \(DINI\)](#) or [Inquiring into Item Availability \(DIAV\)](#).

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

You can use the upload for any type of inventory transaction that is also available in [Working with Inventory Transactions \(WITI\)](#); for example, you can upload transfers, adjustments, returns to vendor, and resets of on-hand quantity. System transactions such as shipments or purchase order receipts are not allowed. The upload performs the same edits and validations as in batch or interactive inventory transactions.

For more information: See *Generic Inventory Transaction Upload* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

Other inventory integrations: In addition to the inventory transaction upload, you can use the:

- *Generic Inventory Download API* to download current inventory information, such as availability and warehouses where an item/SKU is stored, to an external system, such as Order Orchestration. You can schedule the download periodically, such as once a day; the system also creates trigger records based on changes to availability levels.
- *Generic Inventory Inquiry API* to respond to requests for inventory information from an external system. Through this API, the system responds to requests “behind the scenes,” and the activity is not visible on any screen.

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

- integration with Order Orchestration to share item and inventory information with multiple systems and to submit orders to another system for fulfillment. See the [Order Orchestration Integration Overview](#) for background.

Point of Sale Bi-Directional Processing

The following process allows you to receive a request from an external system or Order Orchestration, and generate a response.

Customer Inquiry (Search) Integration

Purpose: Use the generic customer inquiry integration to enable an external system to find a customer based on standard search criteria, such as alternate customer number, postal code, last name, phone number, or email address. The information in the response from Order Administration includes the customer number as well as name and address.

This search function has options similar to the [Select Customer Sold To Screen](#), and produces similar results. When you enter search criteria at the [Select Customer Sold To Screen](#), you advance to a subsequent screen listing customers in alphanumeric order based on values that match your search criteria. Similarly, when the system receives a customer inquiry request, it responds with a message listing customers in alphanumeric order based on values that match the search criteria from the request.

You can use this integration together with the customer history integration described below so that, once Order Administration has provided the matching customer(s) from the Customer Sold To table, the external system can then send a customer history request for a selected customer.

For more information: See *Generic Customer Inquiry (Search) API* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

Customer History Integration

Purpose: Use the generic customer history integration to provide a customer's order history to an external system and detailed information about a single order.

The external system can request information using the Order Administration customer number or order number. It can also use its own numbers if they map to the alternate customer number or alternate (web) order number in Order Administration.

When the request provides information on the customer, Order Administration produces a customer history message in response. When the request provides information on the order, Order Administration produces a detailed or summary order message. The request can include the Order Administration customer or order numbers, or the external system can use its own numbers if they map to the alternate customer number or alternate (web) order number in Order Administration.

For more information: See *Generic Customer History API* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

Inventory Inquiry Integration

Purpose: Use the generic inventory inquiry integration to provide current inventory information for items upon request. For example, you might use this integration to send up-to-date inventory information when it is requested by an external system. See [Inventory Transaction Upload](#) for a comparison between this integration and other generic inventory integrations.

For more information: See *Generic Inventory Inquiry API* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

Point of Sale Integration Setup

You must perform the necessary Order Administration setup and processing to use the point of sale Integration.

Information requiring setup includes:

- [System Control Values](#)

- [Menu Options](#)
- [Periodic Functions](#)

For more information: See the *Generic Order Interface (Order API)* and the *Generic Inventory Transaction Upload* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for information on setup related to these interfaces.

System Control Values

System Control Value	Description
Create Generic Item Download Trigger Records (I15)	Select this field to create item download triggers in the IL Outbound Trigger table to download to the point of sale system.
Create Generic Vendor Download Trigger Records (I16)	Select this field to create vendor download triggers in the IL Outbound Trigger table to download to the point of sale system.
Create Generic Invoice Download Trigger Records (I17)	Select this field to create invoice download triggers in the IL Outbound Trigger table to download to the point of sale system.
Create Generic Inventory Download Triggers (I32)	Select this field to create inventory download triggers in the IL Outbound Trigger table to download to the point of sale system.
Create Generic Customer Download Triggers (L12)	Select this field to create customer download triggers in the IL Outbound Trigger table to download to the point of sale system.
Outbound Interface Trigger File Purge Days (I14)	Enter the number of days to retain records in the IL Outbound Trigger table before purging them. Run the PURGIJT periodic function (program name ILR0026) to delete any records if: Last processed date is less than the current system date by the number of purge days and Status is X. You can also use the Purge option at the Work with Outbound Interface Transactions Screen to purge records. Example: Today is 2/07, and you have set this value to 1. Any record whose <i>Last processed date</i> is 2/06 or earlier is purged.

Menu Options

Menu Option	Description
Generating Outbound Interface Triggers (GOIT)	Allows you to create an IL outbound trigger record for each item/SKU, vendor, and/or invoice in your company. Run this process to initially send your data to the point of sale system.
Working with Outbound Interface Transactions (WOIT)	Allows you to review, delete, or resend IL outbound trigger records.

Menu Option	Description
Working with Integration Layer Processes (IJCT)	Use this option to create the process queues and required message queues and queue managers to send and receive messages for each integration. Also, define trigger rules, XML inclusion rules, and queues for the following IL Process jobs related to point of sale: Item Outbound: processes triggers with a File code of SKU and generates an item download message. Invoice Outbound: processes triggers with a File code of IHD and generates an invoice download message. Vendor Outbound: processes triggers with a File code of VND and generates a vendor download message. Inventory Outbound: processes triggers with a File code of ITW and generates an inventory download message.

Periodic Functions

Periodic Function	Description
Purge IJCT Download (program name ILR0026)	Run this periodic function to purge processed IL outbound triggers, based on the Outbound Interface Trigger File Purge Days (I14) system control value: Capture date is less than the current system date by the number of purge days and Status is X
Start All IJCT Jobs (program name MSX1288)	Run this periodic function to start all IL Process jobs in the Working with Integration Layer Processes (IJCT) menu option.
Stop All IJCT Jobs (program name MSX1289)	Run this periodic function to end all IL Process jobs in the Working with Integration Layer Processes (IJCT) menu option.

Batch Inventory Overlay Upload

Purpose: Use the batch inventory overlay upload process to update the on-hand quantities for a batch of item locations.

A periodic function processes the contents of a pipe-delimited text file that is placed in the CWDIRECTCP_UPLOAD_DIRECTORY through the Work with File Uploads (WUPL) option, or uploaded through the [File Storage API](#).

Processing: The batch overlay upload:

- Processes the inventory upload file if it is found in the directory:
 - Defined in the CWDIRECTCP_UPLOAD_DIRECTORY property or,
 - In the OMS-IMPORTS container of the FILE_STORAGE table.
- For each row in the file, updates the Item Location record with the on-hand quantity, or creates the Item Location record if the Item Warehouse exists.
- Resets the on-hand quantity for the Item Warehouse record.
- Submits a record to the Evaluate Backorder queue, if needed.
- Writes any errors to an error file in the:

- Errors subfolder of the `CWDIRECTCP_UPLOAD_DIRECTORY`, as described below, or
- `OMS-ERRORS` container of the `FILE_STORAGE` table.
- Deletes the file after processing is complete after writing any errors to the:
 - `Errors` subfolder, or
 - `OMS-ERRORS` container of the `FILE_STORAGE` table. You can download this file through the file storage API.

The periodic function does not:

- Reset the on-hand quantity to be lower than the reserved quantity.
- Write an Inventory Transaction History record.

Setup: Setup for the batch overlay process includes:

- Create the `INVOVRL` (Program Name `PFINVOVR`) periodic function and assign it to a periodic process.
- [Working with Admin Properties \(CPRP\)](#): Set the following admin properties:
 - **`COMMIT_RATE`**: The number of records to process at a time. In most cases, should be set to 1000 for optimal processing.
 - **`OVERLAY_DEBUG`**: Set to Y in order to create entries in the Job.log file. The log notes the number of records in the file, the number of records successfully processed, the number of errors, and the time to process, for example: File: `INV_OVERLAY_005.TXT` Rows: 4 Success: 1 Errors: 3 Start Time: Mon Mar 04 16:03:11 EST 2019 End Time: Mon Mar 04 16:03:11 EST 2019 Time In Seconds: 0.041420431 Time In Minutes: 6.903405166666667E-4
 - `CWDIRECTCP_UPLOAD_DIRECTORY`: Indicates the location where the periodic function looks for the batch overlay import file if you are not using the file storage API; otherwise, see the [File Storage API](#) for more setup information.

File name: The batch overlay upload file placed in the upload directory or uploaded through the file storage API should be named `INV_OVERLAY_SEQ.TXT`. A zip file such as `INV_OVERLAY_SEQ.ZIP` is also supported if using the file storage API, provided the zip file includes a single file using the same name, for example, `INV_OVERLAY_SEQ.ZIP` contains `INV_OVERLAY_SEQ.TXT`. In all cases, the `SEQ` is a unique, optional sequence number. If there are multiple files in the upload directory or the `OMS-IMPORTS` container, the function processes them in order based on the sequence number.

File layout: A sample row in the batch overlay upload file is:

```
6|1000|RED 5|1|A010101|50
```

Where:

- 6 is the company.
- 1000 is the item code.
- RED 5 is the SKU, if any; otherwise, this field should be empty.
- 1 is the warehouse code.
- A010101 is the warehouse location.
- 50 is the new on-hand quantity to overlay the current on-hand quantity.

Errors: If the function finds any errors, it writes a copy of the file in:

- The Errors subfolder in the CWDIRECTCP_UPLOAD_DIRECTORY or
- The OMS-ERRORS container of the FILE_STORAGE table.

The TXT suffix is replaced with ERROR: for example, INV_OVERLAY_123.ERROR. The function adds a description of the error to the row in the error file. Possible errors include:

- Location is not valid: Either the location or the company is invalid.
- No Item Warehouse row found: Possible explanations include:
 - A matching Item Warehouse record does not exist for the specified Item Location.
 - The item specified is invalid.
 - No SKU is specified for a SKU'd item.

**Note:**

Matching for alphanumeric data, including the item, SKU, and location code, is case-sensitive.

- Requested overlay brings on hand below Printed or Reserved: The overlay quantity is lower than the current printed or reserved quantity for the Item Location.
- Invalid number of entries: Possible explanations include:
 - A row is empty.
 - There is no company or quantity specified for the row.
- One or more entries are invalid: Possible explanations include:
 - No item was specified.
 - No warehouse was specified.
 - No location was specified.

Logging: The process writes records to the App.log file indicating:

- The number of records successfully updated.
- The number of records in error.
- That the file was deleted after processing.

**Note:**

- To prevent potential errors, Oracle recommends not passing updates to the same Item Location in the same upload file.
- If the zip file in the OMS-IMPORTS folder does not contain a text file with a matching name, no processing occurs and the file is deleted.

Importing Store Cross Reference Locations through Order Orchestration's Discovery Web Service

Purpose: You can use Order Orchestration's discovery web service to request the codes, descriptions and addresses of locations from Order Orchestration, and use this information to create Store Cross Reference records in Order Administration. A periodic function calls the web service and specifies the system in Order Orchestration whose locations should be imported and used to create the cross-reference records.

Location discovery setup:

- Periodic function: Create a periodic function such as IMPSTLC using the Program name PFR0122 and assign it to a periodic process. The Parameter for the periodic function is composed of up to 11 positions, where:
 - position 1 = Y or y if the store cross-reference records should be created with the [Ship for Pickup](#) flag selected; otherwise, you would typically set the first position to N. If the first position is set to anything other than Y or y, the Ship for pickup flag is unselected for the Store Cross Reference record.
 - positions 2-11 = The code identifying the system associated with the locations. Must be a valid system code in Order Orchestration.

Example: If the parameter is set to NPOS, the periodic function imports location records for system POS in Order Orchestration, and leaves the Ship for pickup flag for each imported location unselected.
- Required property file setting: To import locations using the discovery web service, you need to set the OROB_DISCOVERY_SERVICES_WSDL_LOCATION property in [Working with Customer Properties \(PROP\)](#) to the endpoint for the Discovery Services web service. This entry should be set to https://SERVER:8443/Locate/DiscoveryServices, where SERVER is the name of your Oracle Retail Order Orchestration server.



Note:

If the discovery web service requires basic web service authentication, you must define a valid web service authentication user and password in [Working with Web Service Authentication \(WWSA\)](#), or client ID if using OAuth.

Location discovery processing: The periodic function:

- Sends a request to Order Orchestration's discovery web service for locations in the system specified in the Parameter for the periodic function, as described above.
- Receives a response from Order Orchestration's discovery web service, listing all locations in the specified system, excluding the Default Unfulfillable Location.
- For each location code specified in the response message that does not match an existing record, creates a new Store Cross Reference record in the company specified for the periodic process, using the first position of the periodic function's Parameter to determine whether to select the Ship for Pickup flag for the new record. See below for mapping details.

 Note:

- Prior to Order Broker 15.0, the Default Unfulfillable Location is labeled the Default Shipping Location at the **Preferences** screen.
- If there is already a Store Cross Reference record for a location specified in the response message, the function does not update it.
- If the first position of the Parameter is not Y or y, the Store Cross Reference records are created with the Ship for pickup flag unselected.
- If a valid system in Order Orchestration is not specified by positions 2-11 of the Parameter, Order Orchestration does not return any locations in the response, and no Store Cross Reference records are created.
- All characters are converted to uppercase when creating the Store Cross Reference records.
- If the information passed for a field from Order Orchestration exceeds the length of the corresponding field in Order Administration, it is truncated.
- Only the fields listed below are mapped. For example, the apartment or suite, if any, for the location is not mapped from Order Orchestration to Order Administration.
- Order Orchestration does not log the discovery web service messages; however, Order Administration logs the activity in the [OROB \(Oracle Retail Order Orchestration\) Log](#).
- The function does not validate the data passed, such as city, state, or postal code, when creating new records.

For more information: See:

- the Order Orchestration Web Services Guide <https://support.oracle.com> (ID 2953017.1) for details on the discovery web services.
- [Working with Periodic Functions \(WPER\)](#) and [Working with Periodic Processes \(WPPR\)](#) for information on setting up and running the periodic function.
- [Work with Store Cross Reference \(WSCR\)](#) for information on working with Store Cross References and on how they are used.

Location data mapping: The table below describes how the function maps the data from the web service response when creating Store Cross Reference records.

From OROB	Store Cross Reference Record	Comments
N/A	Company code	From the Company specified when executing the periodic process.
location code	Store #	
Name	Description	
N/A	Ship for Pickup	From the first position of the Parameter specified for the periodic function; see above.
Address lines 1-4	Address lines 1-4	Truncated if they exceed 32 positions.
City	City	

From OROB	Store Cross Reference Record	Comments
State or province	State	Truncated if it exceeds 2 positions.
Postal code	Postal code	
Country code	Country code	
Telephone number	Telephone number	Truncated if it exceeds 14 positions.
N/A	Active	Selected (set to Y).

Stored Value Card Integration

Topics in this part: The following topics describe the functions available for stored value card integration.

- [Stored Value Card Overview and Setup](#) provides an overview of stored value card processing and required setup.
- [Stored Value Card Purchase and Activation](#) describes the processing that occurs when a stored value card is purchased and activated.
- [Working with Physical Stored Value Card Assignment \(WPSA\)](#) describes how to assign a number to a physical stored value card.
- [Stored Value Card Balance Inquiry \(MSVB\)](#) describes the processing that occurs when you perform a stored value card balance inquiry.
- [Stored Value Card Authorization Reversal](#) describes the processing that occurs when you reimburse a stored value card payment a cancellation or deactivation amount.
- [Transmitting Activation and Reversal Transactions \(SSVC\)](#) describes how to process stored value card download triggers and generate stored value card XML messages to send to the service bureau for processing.
- [Generating Stored Value Card Refunds](#) describes how to generate a new stored value card to send to the sold to customer when you process a stored value card credit.
- [Customer Engagement Stored Value Card Integration](#) describes the integration between Order Administration and the Oracle Retail Customer Engagement stored value card system.

Stored Value Card Overview and Setup

Overview: Stored value cards are gift cards assigned a pre-paid dollar amount that you can purchase and use as a form of payment. There are two types of stored value cards available in Order Administration: physical cards you ship to the recipient card holder and virtual cards you email to the recipient card holder.

In this topic:

- [Stored Value Card Overview](#)
- [Stored Value Card Setup](#)
 - [Creating a Stored Value Card Item](#)
 - [System Control Values](#)

- [Periodic Function](#)
- [Menu Options](#)
- [Virtual Card Number Table \(FLSVCA\)](#)
- [Creating a Stored Value Card Pay Type](#)
- [Notify Properties](#)

For more information:

- [Stored Value Card Purchase and Activation](#): provides information on purchasing and activating a physical or virtual stored value card.
- [Working with Physical Stored Value Card Assignment \(WPSA\)](#): provides information on assigning a number to a physical stored value card.
- [Stored Value Card Balance Inquiry \(MSVB\)](#): provides information on inquiring on the remaining balance of a stored value card.
- [Stored Value Card Authorization Reversal](#): provides information on reimbursing a stored value card when you process a cancellation or deactivate the card and an open, unused authorization exists.
- [Transmitting Activation and Reversal Transactions \(SSVC\)](#): provides information on processing stored value card download triggers to generate activation and authorization reversal messages to send to the service bureau for processing.
- [Generating Stored Value Card Refunds](#): provides information on generating a new stored value card for a refund amount.
- [Customer Engagement Stored Value Card Integration](#): provides information on the integration between Order Administration and the Oracle Retail Customer Engagement stored value card system.

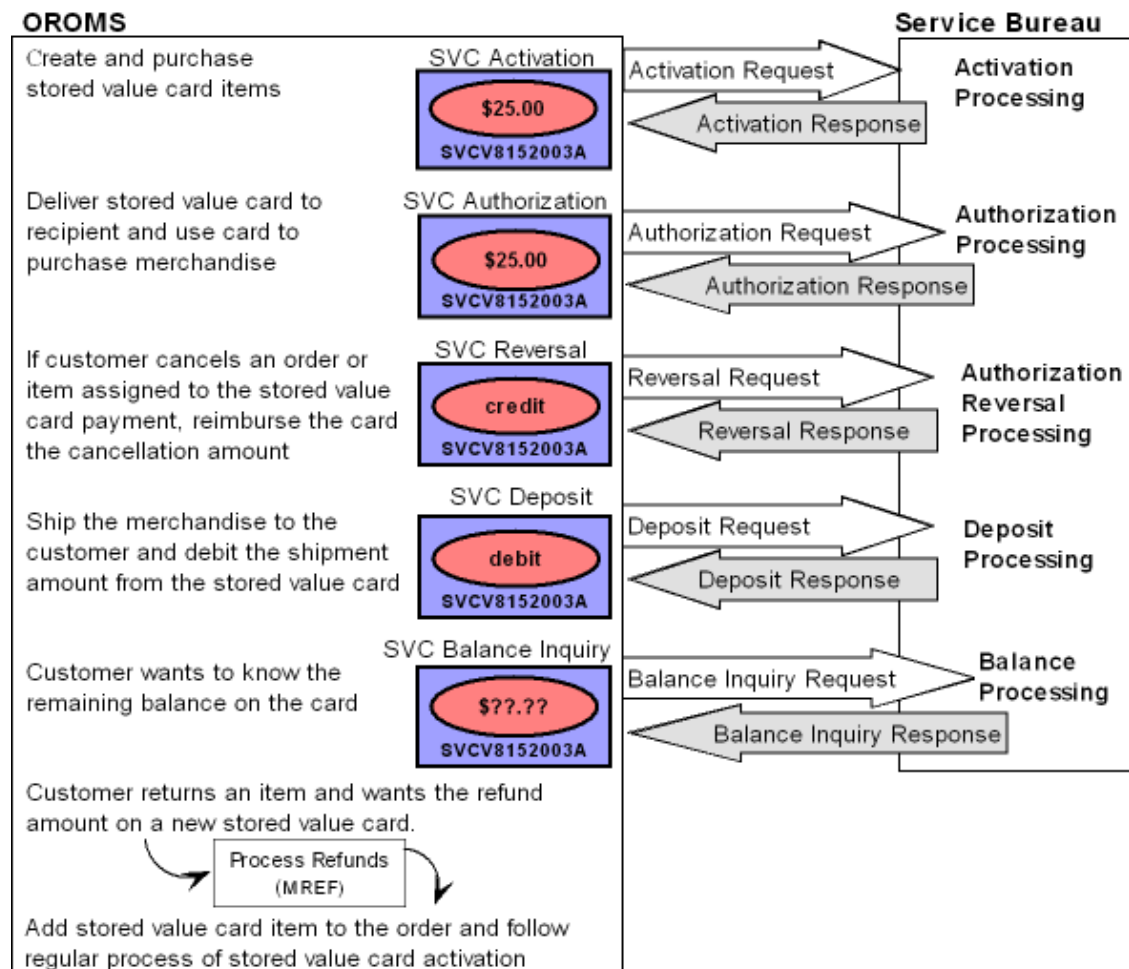
Stored Value Card Overview

In Order Administration:

- You can create an item identified as a *physical* or *virtual* stored value card.
 - *Physical* stored value cards are cards that you can stock in a warehouse or retail location. Physical cards are reserved on an order based on available inventory and printed on a separate pick slip from the other items on the order. Once the card is activated, the system delivers the physical card to the recipient card holder on the order.
 - *Virtual* stored value cards are cards that you do not stock. Virtual cards are automatically reserved on an order and express-billed during pick slip generation. Once the card is activated, an email is sent to the recipient card holder on the order, notifying the customer that a stored value card has been purchased and providing the stored value card number and dollar amount to use as a form of payment.
- Customers can purchase the stored value card item on an order; see [Stored Value Card Purchase and Activation](#).
- Once you generate a pick slip for the order, you must assign a number to the *physical* stored value card before the card is shipped to the customer. The system automatically assigns a number to *virtual* stored value cards during pick slip generation.
- Once the stored value card is billed, the card is sent to the service bureau for activation.
- Once activated, the card is delivered to the recipient card holder on the order.
- The customer can then use the stored value card as a form of payment on an order.

- The service bureau authorizes and deposits the amount assigned to the stored value card payment.
- The customer can inquire on the remaining balance on the stored value card; see [Stored Value Card Balance Inquiry \(MSVB\)](#).
- In addition:
 - If the customer cancels an order or order line that is paid for by a stored value card payment with an open authorization or deactivates the stored value card payment, the system generates a stored value card authorization reversal to reimburse the stored value card the original authorization amount; see [Stored Value Card Authorization Reversal](#).
 - If the customer returns a line that is paid for by a stored value card payment, the system generates a refund credit against the stored value card. When you deposit a refund credit against a stored value card, the service bureau sends back a new authorization number with the deposit response; because of this, the system creates a new authorization for the credit amount that is already updated to a deposit status. At this point, the credit amount is reimbursed to the stored value card.
 - You can define a stored value card credit as an alternate refund type; when you process stored value card credits, the system issues a new stored value card to the sold to customer for the refund amount; see [Generating Stored Value Card Refunds](#).

Stored value card process flow



Stored Value Card Setup

Purpose: Before you can use stored value cards, you must perform the necessary setup.

Required setup includes:

- [Creating a Stored Value Card Item](#)
- [System Control Values](#)
- [Periodic Function](#)
- [Menu Options](#)
- [Virtual Card Number Table \(FLSVCA\)](#)
- [Creating a Stored Value Card Pay Type](#)
- [Notify Properties](#)

Creating a Stored Value Card Item

There are two types of stored value cards in Order Administration:

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

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

The *SVC type* field at the item level indicates if the stored value card is a physical or virtual card:

- Physical Card indicates the stored value card is a physical card.
- Physical Card/Early Notify indicates the stored value card is a physical card and, as soon as the stored value card is activated, the system sends an email notification to the recipient card holder on the order, notifying the customer that a stored value card has been purchased and is in the process of being delivered.
- Virtual Card indicates the stored value card is a virtual (non-physical) card. Virtual cards automatically reserve when added to an order and are express-billed during pick slip generation, regardless of the *Non-inventory* flag. Once the stored value card is activated, the system sends an email notification to the recipient card holder on the order, notifying the customer that a stored value card has been purchased and the stored value card number to use when making a purchase.

Some things to note when creating a stored value card:

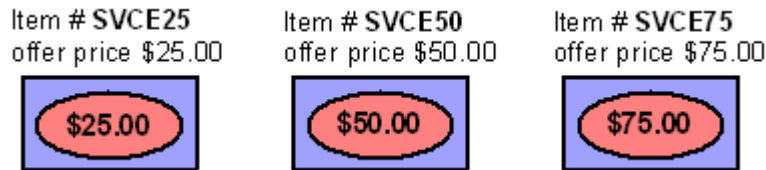
- The offer price is used as the pre-defined amount assigned to the stored value card if the [Stored Value Card Activation Pricing Method \(I25\)](#) system control value is set to OFFER. This is important to note if you create a stored value card as a SKU item and each SKU represents a different dollar amount; make sure you create a SKU offer for each SKU

instead of using the item offer; otherwise each SKU of the stored value card will be assigned the dollar amount defined at the item offer level.

- It is recommended you create the stored value card as a regular SKU or non-SKU item. For example, do not create the stored value card as a membership item or with a kit type.
- You can create the stored value card item as an inventory or non-inventory item. If you wish to track how many cards are available for pre-defined denominations, you should create the stored value card as an inventory item.
- You cannot assign a specific group of numbers to a stored value card item. See [Assigning a Stored Value Card Number](#).

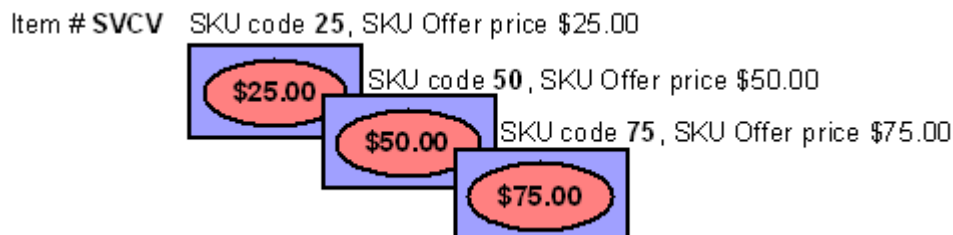
Stored value card refund item: When you process stored value card refunds, the system adds a stored value card item to the order for the refund amount. You define the stored value card refund item in the [Default SVC Refund Item Number \(I73\)](#) system control value. This item must be a non-SKU item with the *SVC type* field set to P or E. See [Generating Stored Value Card Refunds](#).

Stored Value Card example using non-SKU:



Item Level	Item Offer Level
Item #: SVCE25	Price: \$25.00
SVC type: Physical Card/Early Notify	
Item #: SVCE50	Price: \$50.00
SVC type: Physical Card/Early Notify	
Item #: SVCE75	Price: \$75.00
SVC type: Physical Card/Early Notify	

Stored Value Card example using SKU:



Item Level	SKU Level	SKU Offer Level
Item #: SVCV	SKU: 25	Price: \$25.00
SVC type: V (virtual card)		

Item Level	SKU Level	SKU Offer Level
Item #: SVCV SVC type: V (virtual card)	SKU: 50	Price: \$50.00
Item #: SVCV SVC type: V (virtual card)	SKU: 75	Price: \$75.00

System Control Values

The [Stored Value Card Processing Values \(I71\)](#) umbrella system control value contains the following values to control how stored value cards are processed.

System Control Value	Description
Use Streamlined Stored Value Card Billing (I23)	Select this field if you wish the system to send pick control records containing physical stored value cards to billing once you assign numbers to the physical cards; this assumes you never send pick control records containing physical stored value cards to a manifesting station to wand and bill the stored value card items.
Stored Value Card Modulus Checking Method (I24)	Enter the type of modulus check, if any, you wish to perform against the stored value card number. If you enter a modulus check, you can validate the stored value card number before sending the card to the service bureau for activation.
Stored Value Card Activation Pricing Method (I25)	Enter the price the system will assign to the stored value card as the card's issue amount. You can select the offer price or order detail line price.
Stored Value Card Activation Authorization Service (I26)	Enter the code for the service bureau used to process stored value card activation requests. If you use the Customer Engagement Stored Value Card Integration, you must enter RLT.
Stored Value Card Email Notification Program (I30)	Enter the name of the program the system uses to generate a Stored Value Card Notification Email . You can send an email notification to the recipient card holder for virtual stored value cards and physical stored value cards set up with email notification, or generate the <i>Outbound Email XML Message (CWEmailOut)</i> . For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). The base program name is SVCNOTF.
Use Activation / Reversal Batch Processing (I50)	Select this field if you wish to process stored value card activation and authorization reversal transactions in batch mode. When you activate a stored value card or process a stored value card authorization reversal, the system generates a stored value card download trigger record. - If this system control value is selected, the system does not process the stored value card trigger records until you submit the batch process using the Transmitting Activation and Reversal Transactions (SSVC) menu option or a periodic function. In this situation, the SVC Activation and SVC Reversal integration layer jobs can remain inactive. - If this system control value is unselected, when active, the SVC Activation and SVC Reversal integration layer jobs monitor for stored value card download trigger records to process immediately.

System Control Value	Description
Default SVC Refund Item Number (I73)	Enter the stored value card item the system adds to an order when you process a stored value card refund. This item represents the new stored value card that is sent to the customer for the amount of the processed refund. The system adds this item to the order at no charge and defaults the Price Override Reason for SVC Refund Item (I74) to the order line.
Price Override Reason for SVC Refund Item (I74)	Enter the price override reason code the system defaults to the stored value card no charge order line that is added to an order when you process a stored value card refund.
Default Pick Generation Template for SVC Refund Processing (I75)	Enter the streamlined pick slip generation template (WSPS) the system uses to automatically generate a pick slip for the stored value card item that is added to an order when you process a stored value card refund.
Perform Balance Inquiry during Batch Authorizations (J19)	Select this field if you wish to perform a balance inquiry against a stored value card pay type before performing a batch authorization against the card. The system sends a balance inquiry request in batch format to the service bureau to determine the balance on the card. • If the balance on the card is equal to or greater than the amount to authorize for the pay type on the order, the system continues with pick slip generation and sends a batch authorization request to the service bureau to authorize the card for the specified amount. • If the balance on the card is less than the amount to authorize for the pay type on the order, and: – the stored value card is the catch-all pay type on the order, the system places the order on hold, using the Hold Reason for Stored Value Cards with Insufficient Funds (J18) and does not generate a pick slip for the order.  Note: If a hold reason code is not defined, a pick slip is not generated; however, the order remains in an open status. – there is a different catch-all pay type on the order, such as a credit card, the system authorizes the stored value card for the remaining balance and authorizes the catch-all pay type for the remaining amount to authorize. See Batch Authorization Balance Inquiry for more information. If you are using the Customer Engagement Stored Value Card Integration, select this system control value. Oracle Retail Customer Engagement will approve an authorization for an amount that is less than the required authorization amount for an order. If you do not select this system control value, you must require another credit card payment on an order.
Hold Reason for Stored Value Cards with Insufficient Funds (J18)	Enter the hold reason code the system uses to place an order on hold when you Perform Balance Inquiry during Batch Authorizations (J19) and the balance remaining on a catch-all stored value card pay type is less than the amount to authorize.

System Control Value	Description
Perform Authorization Reversal during Deposit Processing (J20)	Select this field if you wish to perform a stored value card authorization reversal during deposits processing if the authorization amount is greater than the deposit amount. Deselect this system control value if you are using the Customer Engagement Stored Value Card Integration.
Retain Unused Stored Value Card Authorization After Deposit (J21)	Select this field if you want the system to retain a stored value card authorization after it has been partially deposited. For example, if the authorization amount is 50.00 and the deposit amount is 40.00, the system retains the remaining 10.00 on the authorization. Leave this field unselected if you want the system to void the remaining balance against the authorization. For example, if the authorization amount is 50.00 and the deposit amount is 40.00, the system voids the remaining 10.00 on the authorization. If there are multiple authorizations for the order, the system does not void the other authorizations. Select this system control value if you are using the Customer Engagement Stored Value Card Integration.
Use Gift Card Fraud Checking (L72)	If selected, the system places an order on GC Gift Card order hold if it contains a stored value card item and a stored value card payment method.

Periodic Function

Periodic Function	Description
Stored Value Card Unactivated Report (program name PFR0075)	Create this periodic function to generate the Unactivated Stored Value Card Report . Use this report to review any stored value cards that require attention because: - the stored value card was declined by the service bureau for activation - the stored value card was billed at the manifest station without a number assignment
Process Stored Value Card Activations (program name PFR0076)	Create this periodic function to process stored value card activation trigger records that are in a ready (R) status.
Process Stored Value Card Reversals (program name PFR0077)	Create this periodic function to process stored value card authorization reversal trigger records that are in a ready (R) status.

Menu Options

Menu Option	Description
Working with Physical Stored Value Card Assignment (WPSA)	Allows you to assign a number to a physical stored value card. See Assigning Numbers to Physical Stored Value Cards for more information.

Menu Option	Description
Working with Tickler Events (WTEV)	Activate the SV tickler event to generate a tickler when a stored value card item is billed without a number assignment. Activate the SD tickler event to generate a tickler when a stored value card activation request is declined by the service bureau.  Note: To create ticklers, the Use Workflow Management (H96) system control value must be selected.
Working with Pay Types (WPAY)	Create a stored value card pay type. See Creating a Stored Value Card Pay Type for additional setup. Additionally, if you wish to always generate a stored value card refund for a particular pay type, enter a stored value card pay type as the alternate refund type.

Menu Option	Description
Working with Integration Layer Processes (IJCT)	Stored Value Card Reversal: The SVC_REVRSL job creates a stored value card authorization reversal request for each unprocessed AHR download trigger in the IL Outbound Trigger table. If the Communication type field for the service bureau is Integration Layer, you must define: - the outbound queue where messages are placed to send to the service bureau. - the inbound queue that receives responses from the service bureau.

 Note:

Order Administration is hard-coded to use the SVC_REVRSL job to process stored value card authorization reversals; you cannot create a new integration layer job with a different process name to process stored value card authorization reversals.

 Note:

To avoid conflict, make sure you set up each

Menu Option	Description
	integration layer process that sends messages to the external system with a unique queue so that the system can identify the different types of messages it is receiving.
Defining Authorization Services (WASV)	Create a service bureau for the service that you will use to process stored value cards.
Transmitting Activation and Reversal Transactions (SSVC)	Allows you to process stored value card download triggers and generate stored value card XML messages to send to the service bureau for processing.
Working with Refunds, Writeoffs and Balances Due (WREF)	Allows you to change a refund to a stored value card refund (refund type V) by entering a stored value card pay type in the <i>Pay type</i> field.
Order Entry/Maintenance Balance Inquiry	Allows you to inquire on the remaining amount available on a specified stored value card pay type and card number.

Virtual Card Number Table (FLSVCA)

Use this table to automatically assign the next available number to a virtual stored value card during pick slip generation. Once the system assigns the number to a virtual stored value card, the number is removed from this table and the virtual stored value card is processed through billing.

Oracle Retail Customer Engagement stored value card integration: If you use the [Customer Engagement Stored Value Card Integration](#), you do not need to populate this table; during pick slip generation for a virtual stored value card, Order Administration sends a Generate Card Request to Oracle Retail Customer Engagement and Oracle Retail Customer Engagement returns a Generate Card Response to Order Administration with the assigned virtual card number.



Note:

It is your responsibility to populate this table with stored value card numbers supplied by your service bureau. If this table does not contain an available number to assign to a virtual stored value card, the order for the stored value card will not be billed and the order will print on the [Stored Value Card Assignment Errors Report](#).

Field	Description
Company	The company where the virtual stored value cards are processed.
Card #	A number to assign to a virtual stored value card, provided by the service bureau.
ID #	An ID number to assign to a virtual stored value card, provided by the service bureau.

 Note:

Define an ID number only if your stored value card processor supports it.

Virtual card numbers threshold: You can define a threshold for the system to notify you when the number of records in the Virtual Card Number table is below a specified number. When the actual number of records in the Virtual Card Number table falls below the threshold value, the system sends an email notification to the specified email address, providing you time to add records to this table before all of the virtual stored value card numbers are used.

If you do not already have the Virtual Card Number threshold created, the system automatically creates the threshold when you run the Batch Order Control job; however, you still need to define the threshold criteria; see [Updating Threshold Actual Values](#).

Example: The threshold number you define is 25 with a less than comparison (the actual value must be less than the threshold value you define). Once the actual number of available virtual card number records is 24, the system sends an email to the specified email address.

Threshold Code and Description	Comparison	Number Value	Actual Number	Email address
VC: Virtual card numbers	L (actual value is less than the threshold value)	25	24	tbrown@example.com

Sample email: A sample Threshold Monitor Breach email is displayed below.

From: htruman@CWIEX1.example.COM

To: eleanor.johnson@example.com

Subject: ****ALERT**** Threshold Monitor Breach

Virtual Card Numbers threshold exceeded.

Add numbers to the Virtual Card Number file (FLSVCA)

Co#: 555 Actual\$: 000000024 > Thresh\$: 000000025

Review screens and reports to monitor this breach.

For more information: See [Working with Threshold Values \(WTHR\)](#) for more information on defining threshold values.

Creating a Stored Value Card Pay Type

When creating a stored value card pay type in Working with Pay Types (WPAY), you must define the following information:

- *Pay category*: enter Credit Card as the pay category.
- *Card type*: enter Stored Value as the card type.
- *Authorization service*: enter the authorization service that you will use to process stored value cards.
- *Deposit service*: enter the deposit service that you will use to process stored value cards.
- *Reauthorization days*: Enter the number of days before a stored value card authorization is set to expire. Enter 999 if you use the Customer Engagement Stored Value Card Integration.
- *Modulus check*: enter a modulus check to verify the stored value card number is valid before sending the card to the service bureau for authorization.

In addition to creating a stored value card pay type:

- Enter the stored value card pay type in the *Alternate refund type* field for each pay type for which you always wish to generate a stored value card refund.
- Create a credit card number format if you do not want the full stored value card number to display on Order Administration screens and reports.

Notify Properties

In order to respond to Order Administration jobs that may require user intervention to proceed, you must set up the notify properties in Working with Admin Properties (CPRP).

Why would a job require user intervention?

- An error occurred during processing
- The job is used to send transactions to another system and communication failures occur before the transmission completes

Which types of job require user intervention?

- Stored Value Card (activation, balance inquiry or authorization reversal) integration layer job
- Authorization (batch only, for all card types) integration layer job
- Deposit integration layer job

Property Name	Description
RESPONSE_RETRIES	The number of times Order Administration looks for a response to a job that requires user intervention before using the default response in order to proceed with the job. For example, if this setting is 5, Order Administration will look for a user response five times, waiting 60 seconds between each time.
RESPONSE_EMAILS	The list of email addresses that receive the Response Required email when a job requires user intervention. Each email address entered must be separated by a semi-colon (;). For example: email1@add.com;email2@add.com.

For more information: See [Working with Required Responses \(WREQ\)](#) for more information on the steps performed when a job requires user intervention.

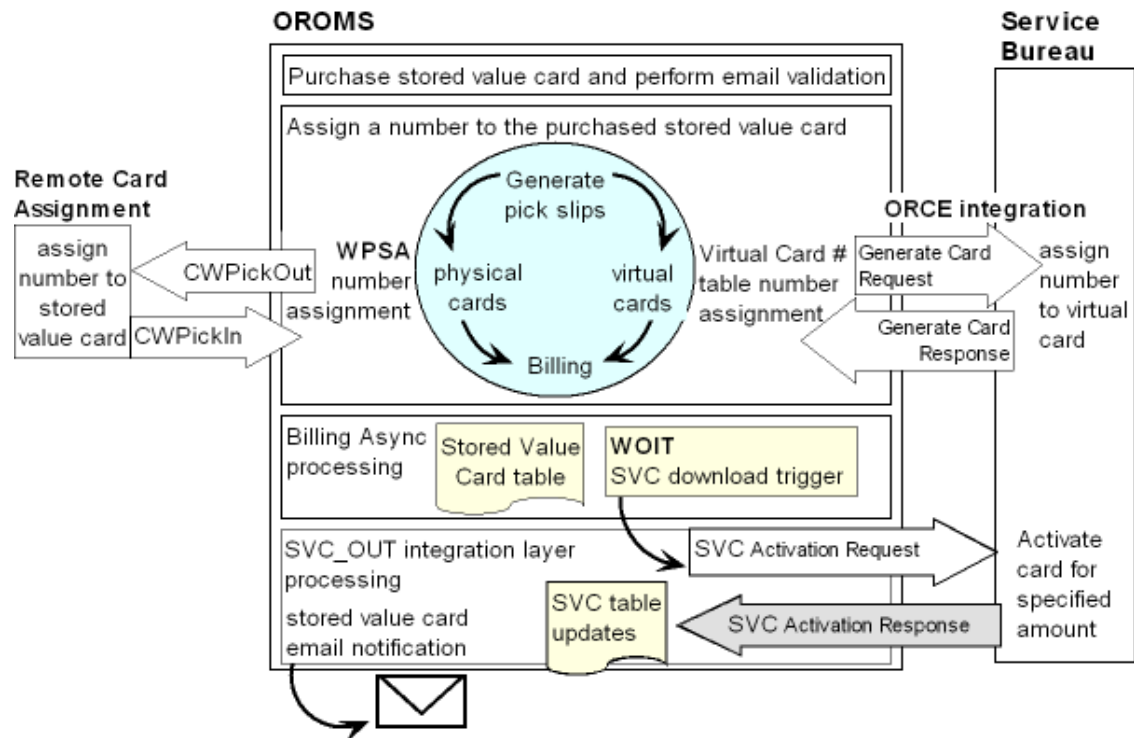
Stored Value Card Purchase and Activation

Purpose: You can purchase a stored value card item on an order to deliver to the recipient card holder by mail or email. However, before the recipient card holder can use the stored value card as a form of payment, the card must be activated by the service bureau.

Activation processing: To activate a stored value card:

#	Step
1.	A customer purchases a stored value card item on an order. If the stored value card is a <i>virtual</i> card, the system verifies that an email address is defined for the recipient card holder. See Purchasing a Stored Value Card .
2.	During pick slip preparation, the system creates a separate pre-generated pick for each <i>physical</i> stored value card. - After the picks are printed, you must: - Use Working with Physical Stored Value Card Assignment (WPSA) to assign a number to <i>physical</i> stored value cards by pick control number, <i>OR</i> - If you use an external system to assign numbers to physical cards, receive the card number in the <i>CWPickIn XML Message</i>. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). See Assigning Numbers to Physical Stored Value Cards for additional details. - For virtual stored value cards, during pick slip generation the system: - Assigns a number to the card from the Virtual Card Number Table (FLSVCA), <i>OR</i> - If you are using the Customer Engagement Stored Value Card Integration, assigns a number to the card by sending a Customer Engagement Generate Card Request to the Oracle Retail Customer Engagement system. See Assigning Numbers to Virtual Stored Value Cards.
3.	Once the stored value card is billed (see Billing a Stored Value Card), the system generates an SVC download trigger containing the information required to activate the card.
4.	The system sends a stored value card activation request to the service bureau for activation. - If the Use Activation / Reversal Batch Processing (I50) system control value is selected, the system does not process the SVC download trigger until you submit the batch process from the Transmitting Activation and Reversal Transactions (SSVC) menu option. In this situation, the SVC Activation integration layer job can remain inactive. - If the Use Activation / Reversal Batch Processing (I50) system control value is unselected, when active, the SVC Activation integration layer job monitors for SVC download trigger records to process immediately. See Activating a Stored Value Card.
5.	Once an approved stored value card activation is received from the service bureau, the system updates the stored value card and sends a Stored Value Card Notification Email to the customer, if defined, indicating the stored value card activation information.

Stored Value Card Activation Process:



In this topic:

- [Purchasing a Stored Value Card](#)
 - [Stored Value Card Email Hierarchy](#)
- [Assigning a Stored Value Card Number](#)
 - [Assigning Numbers to Physical Stored Value Cards](#)
 - [Pick Stored Value Card Table](#)
 - [Assigning Numbers to Virtual Stored Value Cards](#)
- [Billing a Stored Value Card](#)
 - [Stored Value Card Table](#)
- [Activating a Stored Value Card](#)
 - [Identifying SVC Download Triggers](#)
 - [Generating the Stored Value Card Activation Request](#)
 - [What Happens When the Stored Value Card Activation is Approved?](#)
 - [Stored Value Card Notification Email](#)
 - [What Happens When the Stored Value Card Activation is Declined?](#)
- [Reviewing Stored Value Card Activation Status](#)
 - [Display Stored Value Cards Screen](#)

Purchasing a Stored Value Card

You purchase a stored value card as you would any item.

Physical stored value cards: When you purchase a physical stored value card (SVC type Physical Card or Physical Card/Early Notify), the system:

- Reserves the item on the order, based on available inventory.
- Does not require an email address, even if the stored value card is eligible for email notification. If you ordered a physical stored value card (with email notification) and an email address is not defined, the system still allows you to accept the order; however, the [Stored Value Card Notification Email](#) is not sent.

**Note:**

You can create a custom special handling template to capture stored value card information, such as the gift giver's name, recipient's name, and any gift message.

Virtual stored value cards: When you purchase a virtual stored value card (SVC type Virtual Card), the system:

- Automatically reserves the item on the order and express bills the item during pick slip generation.
- Requires an email address to send the [Stored Value Card Notification Email](#) to the recipient card holder. An email address is required because the email notification is the only way the recipient of the virtual stored value card will receive the stored value card number associated with the order. If you order a virtual stored value card item and an email address is not defined or the opt in/out value is invalid, the system displays an error and does not allow you to accept the order: `Invalid e-mail address/opt in for order containing virtual SVC item`. A similar error also displays when you process a web order. See [Stored Value Card Email Hierarchy](#).

For more information: See [Assigning a Stored Value Card Number](#) for more information on how to assign a number to a stored value card.

Gift card hold: If the [Use Gift Card Fraud Checking \(L72\)](#) system control value is selected, the system places an order on GC Gift Card order hold if it contains a stored value card item and a stored value card payment method.

Stored Value Card Email Hierarchy

When a stored value card is activated and an email address is defined, the system sends a [Stored Value Card Notification Email](#) to the recipient of the stored value card.

The system uses the following hierarchy to determine the email address used to send a Stored Value Card Notification email to the recipient card holder. This email validation occurs in order entry and maintenance and during the generic order interface edit.

1. Send to ship to email address: Send the email to the email address defined for the ship to on the order.
 - Order ship to: Send the email to the email address defined for the order ship to. The system requires an email address for the order ship to if a stored value card item exists on the order: `Invalid email address/opt in for order containing virtual SVC item`.
 - Customer ship to: If an order ship to does not exist, send the email to the email address defined for the customer ship to. The system requires an email address for the customer ship to if a stored value card item exists on the order. In addition, the *Opt in/opt out* setting must allow for email delivery (codes O1 or O2): `Invalid email address/opt in for order containing virtual SVC item`.

- **Recipient (Sold To/Recipient):** If an order ship to or customer ship to does not exist, send the email to the email address defined for the recipient customer. The system requires an email address for the recipient if a stored value card item exists on the order. In addition, the *Opt in/opt out* setting must allow for email delivery (codes O1 or O2): Invalid email address/opt in for order containing virtual SVC item.
2. **Send to customer sold to email address:** If a ship to does not exist on the order, send the email to the email address defined for the customer sold to. The system requires an email address for the customer sold to if a stored value card item exists on the order. In addition, the *Opt in/opt out* setting must allow for email delivery (codes O1 or O2): Invalid email address/opt in for order containing virtual SVC item.



Note:

If the email address or opt in/opt out value changes after the order has been accepted and before the stored value card is activated, it is possible that a [Stored Value Card Notification Email](#) may not be generated.

Assigning a Stored Value Card Number

Before you can activate a stored value card, you must first assign a number to the card. Assigning a number to a stored value card occurs during or after pick slip generation, depending on if the stored value card is a physical or virtual card.

- [Assigning Numbers to Physical Stored Value Cards](#)
- [Assigning Numbers to Virtual Stored Value Cards](#)

Assigning Numbers to Physical Stored Value Cards

Follow these steps to assign a number to a physical stored value card (SVC type Physical Card or Physical Card/Early Notify):

1. Generate a pick slip for the order containing the physical stored value card.

When you generate a pick slip for an order containing a physical stored value card, the system:

- prints a separate pick slip for each order line containing a physical stored value card. However, if you wish to print a separate pick slip for each unit of the stored value card item, set up the item as ship alone (*Ship alone* = Ship Alone).
- creates a record in the [Pick Stored Value Card Table](#) for each unit of the stored value card item printed.
- includes the stored value card item on the [Pick Unit Report](#).

Pick Stored Value Card Table

This table contains a record for each physical stored value card item purchased whose pick control number has not yet been confirmed. Once you confirm the pick control number, the system deletes the stored value card record from this table. The system also uses this table to validate that a number has been assigned to the physical card before the card is shipped and confirmed.

Field	Description
Company	The company where you created the pre-generated pick containing the stored value card item.

Field	Description
PCH control #	The pick control number assigned to the pick containing the stored value card item.
Line #	The pick control line number containing the stored value card item.
Seq#	The pick stored value card sequence number.
Card Number	The number assigned to the stored value card. This field is blank when the record is created during pick slip preparation; you use the Working with Physical Stored Value Card Assignment (WPSA) menu option or the <i>svc_card_nbr</i> in the <i>CWPickIn XML Message</i> to assign a number to the physical stored value card after pick slip generation. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

If you void or reprint the pick slip: The system updates the Pick Stored Value Card table if you use the [Reprinting and Voiding Pick Slips \(WVRP or WSVP\)](#) menu option to void or reprint a pick slip and the pick control number containing the physical stored value card item has not yet been billed.

In WVRP when you:	The system:
Decrease the quantity allocated	Deletes the last pick stored value card record(s) created for the order line.
Void the pick slip	Deletes the associated pick stored value card records.
Reprint the pick slip	Deletes the associated pick stored value card records referencing the old pick control number and creates new pick stored value card records for the new pick control number.
Void and unreserve the pick slip	Deletes the associated pick stored value card records.

2. Assign a number to the physical stored value card.

- Use Working with Physical Stored Value Card Assignment (WPSA) to assign a number to a physical stored value card by pick control number, *OR*
- Use the *svc_card_nbr* tag in the *CWPickIn XML Message* to receive a card assignment from an external system.

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

3. Bill the pick control number containing the stored value card item.

The [Use Streamlined Stored Value Card Billing \(I23\)](#) system control value determines when the physical stored value card is sent to billing.

- If this system control value is selected, the system sends the pick control number assigned to the stored value card to billing immediately after you assign a number to the card.
- If this system control value is unselected, the system sends the pick control number assigned to the stored value card to billing after you wand and bill the card at the manifesting station.

If you use the [Manually Confirming Shipments \(MCON\)](#) menu option to confirm a pick control number containing a stored value card item, the system verifies that the stored value card is

assigned a number. If the stored value card is not assigned a number, the system does not allow you to confirm the pick control number or change the status of the pick slip to carryover and instead displays an error message: All stored value card numbers must be entered before accepting.

For more information: See [Billing a Stored Value Card](#) for more information on the processing the system performs when you bill a stored value card.

Assigning Numbers to Virtual Stored Value Cards

To assign a number to a virtual stored value card (SVC type V), generate a pick slip for the order containing the virtual stored value card.

When you generate a pick slip for an order containing a virtual stored value card, the system:

- automatically assigns a stored value card number to the virtual card, using the next available number from the [Virtual Card Number Table \(FLSVCA\)](#) and deletes the record from the Virtual Card Number table.



Note:

Make sure a number is available in the Virtual Card Number table to assign to the virtual stored value card; if a number is not available to assign to the card, the entire order line containing the stored value card item will not be billed and the order will print on the [Stored Value Card Assignment Errors Report](#).

- express bills the item and sends the pick control number containing the virtual stored value card to billing.
- does not include the stored value card item on the [Pick Unit Report](#).

Oracle Retail Customer Engagement Stored Value Card integration: If you are using the [Customer Engagement Stored Value Card Integration](#), the system does not assign a number to a virtual card from the Virtual Card Number table. Instead, the system:

- generates a [Customer Engagement Generate Card Request](#) and sends the message to Oracle Retail Customer Engagement.
- receives the [Customer Engagement Generate Card Response](#) from Oracle Retail Customer Engagement, containing the assigned card number.
- express bills the item and sends the pick control number containing the virtual stored value card to billing.
- does not include the stored value card item on the [Pick Unit Report](#).

For more information: See [Billing a Stored Value Card](#) for more information on the processing the system performs when you bill a stored value card.

Billing a Stored Value Card

When a pick control record containing a stored value card item is billed, the system:

1. Deletes the associated record in the [Pick Stored Value Card Table](#), if the stored value card is a physical card.
2. Determines the issue amount to apply to the stored value card.

The system control value determines the price the system uses as the amount to apply to the stored value card.

- [Stored Value Card Activation Pricing Method \(I25\)](#)
- If this system control value is set to OFFER, the stored value card amount is the offer price. If the offer price is \$0.00, the system uses the order line price.
- If this system control value is set to ORDER or blank, the stored value card amount is the order line price. If the order line price is \$0.00, the system uses the offer price.

If both the offer price and order line price are \$0.00, the stored value card amount is \$0.00.

3. Creates a record in the [Stored Value Card Table](#) for each unit of the stored value card item.

Stored Value Card Table

This table contains a record for each stored value card item that has been billed.

Once you receive an approved activation response from the service bureau, the system updates this table with the activation information. You can review the stored value card at the [Display Stored Value Cards Screen](#).

Additionally, when you purge an order, the system deletes any associated records in this table.

Field	Description
Company	The company where you processed the stored value card.
Order #	The order number where the stored value card was purchased.
Ship to #	The ship to number receiving the stored value card.
Seq #	The order line sequence number.
Seq #	The stored value card sequence number.
Card #	The stored value card number. If the Remove Stored Value Card Number After Activation (J22) system control value is selected, the words REMOVED BY SYSTEM display instead of the credit card number.
Card type	The type of stored value card. • P = Physical card • E = Physical card with email notification • V = Virtual card
Issue date	The date the stored value card was billed.
Issue amount	The amount assigned to the stored value card.
Activation date	The date the stored value card was activated; this is the date the system received and processed the approved stored value card activation response.
Activation time	The time the stored value card was activated; this is the time the system received and processed the stored value card activation response.
Email sent date	The date a Stored Value Card Notification Email was sent to the customer. The system sends an email when an approved activation response is received from the service bureau.
Auth service	The service bureau where the stored value card was sent for activation.
Response code	The activation response received from the service bureau. The system does not update this field until the system receives a stored value card activation response from the service bureau.
ID #	The ID number assigned to the stored value card.

4. Creates an SV tickler, if you [Use Workflow Management \(H96\)](#), for each stored value card item that was processed through billing without a number assignment.

A stored value card may be billed without a number assignment if you send the physical stored value card to the manifesting station without first using the Working with Physical Stored Value Card Assignment (WPSA) menu option to assign a number to the card. The system will not create a SVC download trigger for the stored value card until the card is assigned a number.

See [SV \(SVC Number Assignment\) Event Processing](#) for more information on how to resolve this tickler.

5. Creates an SVC download trigger in the Outbound Interface Transaction table for each stored value card that has been billed and is assigned a stored value card number.

You can review download triggers in the [Working with Outbound Interface Transactions \(WOIT\)](#) menu option. See [Identifying SVC Download Triggers](#).

For more information: See [Activating a Stored Value Card](#) for more information on processing the SVC download triggers.

Activating a Stored Value Card

The system creates an SVC download trigger in the IL Outbound Trigger table when a stored value card item is billed (see [Billing a Stored Value Card](#)).

Identifying SVC Download Triggers

You can view all download triggers in the IL Outbound Trigger table at the [Work with Outbound Interface Transactions Screen](#).

Each SVC download trigger in the IL Outbound Trigger table contains a:

- *File code*: indicating the type of information to download and which IL process job processes the trigger. For SVC download triggers, the *File code* is SVC.
- *Key*: indicating the specific record to download. For SVC download triggers, the *Key* identifies the specific company, order number, ship to number, order detail sequence number, and stored value card sequence number associated with the SVC download trigger. For example, the *Key* 555000066760010000100004 indicates the stored value card information is located in company 555 for order number 6676, ship to number 1, order detail sequence number 1, and stored value card number 4.
- *Capture type*: indicating the type of activity performed against the record. SVC download triggers are always capture type A indicating the stored value card was created.

SVC download triggers in a ready status are processed by the SVC_OUT integration layer job.

File code	Refers to table	Key	IL Process job
SVC	Stored Value Card	1112222222233344444 55555 where: 111 is the company code 22222222 is the order number 333 is the ship to number 44444 is the order detail line sequence number 55555 is the stored value card sequence number	SVC_OUT

Generating the Stored Value Card Activation Request

To generate a stored value card activation request, the system:

#	Step
1.	Creates an SVC download trigger when an order containing a stored value card item assigned a number is billed; see Identifying SVC Download Triggers .
2.	Looks for unprocessed SVC download triggers to process, based on the setting of the Use Activation / Reversal Batch Processing (I50) system control value. • If this system control value is selected, the system does not process the stored value card trigger records until you submit the batch process using the Transmitting Activation and Reversal Transactions (SSVC) menu option or the SVCACT periodic function (program name PFR0076). In this situation, the SVC Activation integration layer job can remain inactive. • If this system control value is unselected, when active, the SVC Activation integration layer job monitors for stored value card download trigger records to process at defined intervals, based on the <i>Outbound delay time</i>. The system: • looks for SVC download triggers with the <i>File code</i> SVC and a status of ready (R). • determines which stored value card activation to download, based on the <i>Key</i> field for the activation download trigger. • looks for a record in the Stored Value Card Table that contains this information.
3.	Looks at the Stored Value Card Activation Authorization Service (I26) system control value to determine the service bureau used to activate stored value cards.

#	Step
4.	Looks at the <i>Communication type</i> field for the service bureau to determine how transactions are processed between Order Administration and the service bureau. - Integration Layer = The system sends activation transactions to the service bureau using the queues defined for the activation integration layer job. - Payment Link = Point-to-point integration. The system sends activation transactions to the service bureau using a point-to-point integration. You must define communication settings in Working with Customer Properties (PROP). The system does not use the activation integration layer job to communicate with the service bureau; however, the system uses the job to process activation triggers. See Process Activations Using Payment Link Communication. Process Activations Using Payment Link Communication If the <i>Communication type</i> field for the service bureau is Payment Link: - Order Administration uses the settings in Working with Customer Properties (PROP) to send the activation request directly to the service bureau in the format of the other system. - The service bureau receives the activation request, processes the activation, and sends a response back to Order Administration.
5.	Order Administration processes the activation response accordingly. See: What Happens When the Stored Value Card Activation is Approved? What Happens When the Stored Value Card Activation is Declined?

What Happens When the Stored Value Card Activation is Approved?

A stored value card receives an approved activation if the activation response contains an authorization number. In this case, the system:

- updates the associated record in the Integration Process Control table to CMP complete (if the *Communication type* field for the service bureau is Integration Layer).
- updates the associated record in the [Stored Value Card Table](#) with the activation date, activation time, and activation response.
- generates a [Stored Value Card Notification Email](#) and sends the email to the recipient card holder.

You can review the activated stored value card at the [Display Stored Value Cards Screen](#). The activated stored value card number will have an *Activation date, time, and response*. Additionally, if a [Stored Value Card Notification Email](#) was sent, the *Email sent* field will display the date the email was sent to the customer.



Note:

If you receive a declined stored value card activation response after you have already received an approved response, the system does not deactivate the stored value card; the card remains activated and available to use as payment.

If a customer returns a stored value card or reports the card stolen: If a customer returns a stored value card or reports the card stolen, you must call the service bureau to deactivate the card.

Stored Value Card Notification Email

The system sends a Stored Value Card Notification email or XML message to the recipient card holder when the SVC_OUT job processes an approved stored value card activation request and:

- The *SVC type* field for the stored value card item is E (physical card with notification) or V (virtual card).
- An email is defined for the recipient card holder. The system uses the [Stored Value Card Email Hierarchy](#) to determine the email address used to send a Stored Value Card Notification email to the stored value card recipient.
- The [Stored Value Card Email Notification Program \(I30\)](#) system control value specifies a valid program name.

A separate email is sent for each unit of a stored value card item ordered. For example, if a customer purchases a stored value card for a quantity of 2 to send to a recipient customer, the recipient card holder receives 2 stored value card emails.

Order history message: The system writes an order transaction history message, indicating a stored value card notification was sent to the stored value card recipient customer: SVC Notice to `acustomer@example.net`.

For more information: See [Working with E-Mail Notification Templates \(WENT\)](#) for more information on how the system generates email notifications, and see [Stored Value Card Notification Sample and Contents](#) for a sample email message. Also, see the *Outbound Email API* for information on when the system generates the *Outbound Email XML Message (CWEmailOut)* instead of an email, and the XML message layout.

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

What Happens When the Stored Value Card Activation is Declined?

A stored value card receives a declined activation if the activation response does not contain an authorization number. In this case, the system:

- updates the associated record in the Integration Process Control table to FLD error (if the *Communication type* field for the service bureau is Integration Layer).
- creates a SD tickler if you Use Workflow Management (H96), indicating the stored value card activation request was declined. See [SD \(SVC Activation Decline\) Event Processing](#) for more information on how to resolve this tickler.
- includes the order containing the declined stored value card on the [Unactivated Stored Value Card Report](#). This report prints when you run the Unactivated Stored Value Cards periodic function (program name PFR0075).
- does not send a [Stored Value Card Notification Email](#) to the customer, since the stored value card was not activated.

You can review the declined stored value card at the [Display Stored Value Cards Screen](#). The declined stored value card number will have an *Activation response*, but a blank *Activation date and time*.

To activate a declined stored value card: You must call the service bureau to activate the card. You cannot re-send an activation request to the service bureau.

Reviewing Stored Value Card Activation Status

In standard Order Inquiry, you can review the stored value cards purchased on an order at the Display Stored Value Cards screen. This screen is also helpful if the customer purchased a virtual stored value card and forgot the number to use when making a purchase.

**Note:**

This screen is not available until the stored value card item has been assigned a number and processed through billing.

Display Stored Value Cards Screen

This screen indicates:

- the type of stored value card purchased
- the issue amount applied to the stored value card
- the card number
- the date the card was processed through billing
- the date and time the card was activated and the response received (if the card received a declined activation response, the system updates the *Response* field but does not update the *Activation date and time*)
- the date a [Stored Value Card Notification Email](#) was sent to the customer

If the [Remove Stored Value Card Number After Activation \(J22\)](#) system control value is selected, the words REMOVED BY SYSTEM display instead of the credit card number.

How to display this screen: At the standard Order Inquiry detail screen, select SVC for an order line containing a stored value card that has been billed.

Field	Description
Order#	The order number and ship to number where the stored value card item was purchased. <i>Order#:</i> Numeric, 8 positions; display-only. <i>Ship to#:</i> Numeric, 3 positions; display-only.
Line#	The order line number containing the stored value card item. <i>Numeric, 3 positions; display-only.</i>
Card type	Indicates the type of stored value card purchased. • Physical card • Physical card with email notification • Virtual card <i>Alphanumeric, 1 position; display-only.</i>
Issue amount	The initial amount applied to the stored value card. This amount does not reflect the remaining balance on the card, if the card has already been used as payment for a purchase. <i>Numeric, 13 positions with a 2-place decimal; display-only.</i>
Card#	The number assigned to the stored value card. If the Remove Stored Value Card Number After Activation (J22) system control value is selected, the words REMOVED BY SYSTEM display instead of the credit card number. <i>Alphanumeric, 20 positions; display-only.</i>
Issue date	The date the stored value card was processed through billing. <i>Numeric, 6 positions (user date format); display-only.</i>

Field	Description
Activation date	The date the stored value card was activated; this is the date the SVC_OUT process received and processed the approved stored value card activation response. <i>Numeric, 6 positions (user date format); display-only.</i>
Activation time	The time the stored value card was activated; this is the time the SVC_OUT process received and processed the stored value card activation response. <i>Numeric, 6 positions (user date format); display-only.</i>
Activation response	The activation response received from the service bureau. <i>Alphanumeric, 10 positions; display-only.</i>
Email sent	The date a Stored Value Card Notification Email was sent to the customer. The system sends an email when an approved activation response is received from the service bureau. <i>Numeric, 6 positions (user date format); display-only.</i>

Stored Value Card Authorization Reversal

Overview: When you process a cancellation associated with a stored value card payment or deactivate a stored value card payment, the system reimburses the original authorization amount to the stored value card.

In addition, if the [Perform Authorization Reversal during Deposit Processing \(J20\)](#) system control value is selected, when you process deposits and the deposit amount is less than the original authorization amount, the system reimburses the stored value card the difference; see [Authorization Reversal Process During Deposits](#).

In this topic:

- [Stored Value Card Authorization Reversal Process](#)
 - [What Happens When the Authorization Reversal is Approved?](#)
 - [What Happens When the Authorization Reversal is Declined?](#)
- [Authorization Reversal Process During Deposits](#)

Stored Value Card Authorization Reversal Process

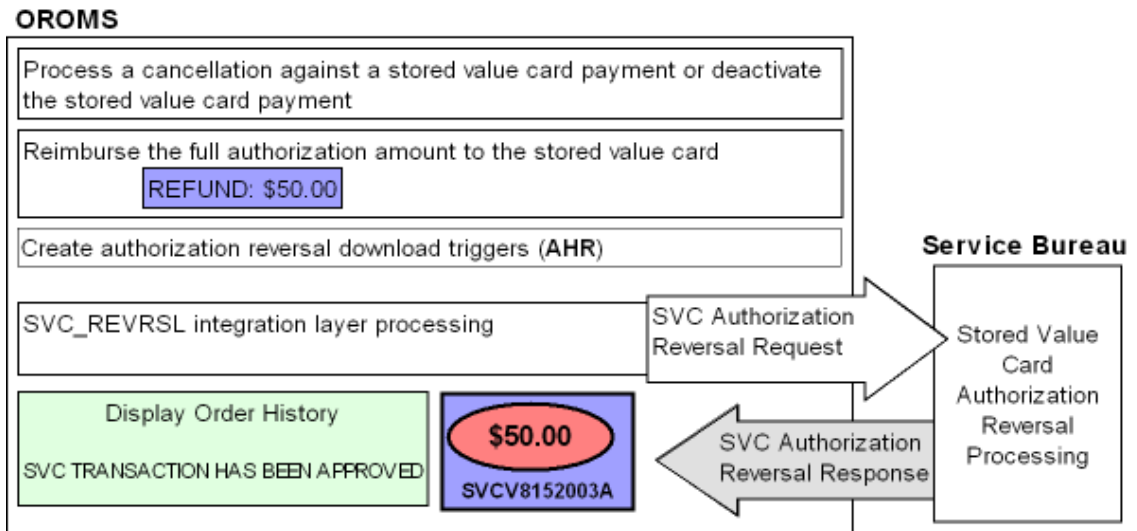
Purpose: The system reimburses a stored value card the original authorization amount associated with the card when you process a cancellation associated with a stored value card payment or deactivate the stored value card.



Note:

If the [Perform Authorization Reversal during Deposit Processing \(J20\)](#) system control value is selected, when you process deposits and the deposit amount is less than the original authorization amount, the system reimburses the stored value card the difference; see [Authorization Reversal Process During Deposits](#).

Stored Value Card Authorization Reversal Process:



#	Step
1.	You process a cancellation associated with a stored value card payment or deactivate the stored value card. You can process a cancellation by: • Selecting Cancel for an order line or selecting Cancel to cancel the entire order in order maintenance. • Selecting Void All/Cancel Order to void the pick slip and cancel the order at the Reprint/Void Pick Slips by Order Screen. • Selecting Cancel Group to cancel a group of order lines based on the cancellation date or item in the Working with Backorders Pending Cancellation (WBPC) menu option. • Processing soldout cancellations by submitting the job using the Processing Auto Soldout Cancellations (MASO) menu option or by selecting Sell Out for an order line in order maintenance. • Submitting a job to cancel orders flagged for cancellation due to credit card decline using the Working with Credit Card Cancellations (WCCC) menu option. • Submitting a job to cancel order lines for a given item and adding a substitute item to each order using the Processing Item Substitutions (PSUB) menu option. • Cancelling an order line or order on the web storefront using the Maintenance E-Commerce Process. You can deactivate a stored value card payment by selecting Deactivate for a stored value card payment at the Enter Payment Method Screen.

#	Step
2.	The system determines if the order is eligible for stored value card authorization reversal. For an order to be eligible for stored value card authorization reversal, the order must: • contain a stored value card payment method that is associated with a cancellation or deactivation. Stored value card payments have a <i>Pay category</i> of Credit Card and a <i>Card type</i> of Stored Value. • have an open, unused authorization remaining for the stored value card. An open, unused authorization is an authorization that is: • in an A (authorized) or O (authorized, but not used) status • not associated with an outstanding pick slip for the order • not partially confirmed or deposited. Also, a reversal is not submitted when any lines on the order are submitted to Order Orchestration for fulfillment. Multiple payment methods: If the order contains one or more stored value card and/or credit card payments, the system performs authorization reversal for each eligible payment method. Authorizations in sent status: When you process a cancellation or deactivate a stored value card payment and the authorization is in an S (sent, but not received) status, the system does NOT create a SVC authorization reversal for the payment even if you later receive an approved authorization response. Expired authorizations: If the original authorization for an order is expired and the order received a new authorization during pick slip generation, the system will create an authorization reversal against the expired authorization when you process deposits. However, the service bureau will reject this authorization reversal since they have already expired the authorization and reimbursed the stored value card.

**Note:**

When the [Send reversal](#) flag is not selected for the authorization service, the system does not create an authorization reversal trigger record, described below, unless the reversal is created because the stored value card payment method is deactivated.

Example 1: The following transactions are applied against a stored value card payment on an order.

Order Activity	Result
You enter an order and pay for the order with a stored value card payment. The balance on the stored value card is 46.31.	The system authorizes the stored value card for \$10.00. The balance on the stored value card is 36.31.
The order amount is 10.00. You send the stored value card for authorization using online authorization.	
You cancel the order in order maintenance.	The system creates a stored value card authorization reversal for \$10.00. Once the authorization reversal is processed, the balance on the stored value card is updated to 46.31.

Example 2: The following transactions are applied against a stored value card payment on an order.

Order Activity	Result
You enter an order and pay for the order with a stored value card payment. The balance on the stored value card is 46.31.	The system authorizes the stored value card for \$10.00. The balance on the stored value card is 36.31.
The order amount is 10.00. You send the stored value card for authorization using online authorization.	
You cancel an order line in order maintenance for 4.00.	The system creates a stored value card authorization reversal for \$10.00. Once the authorization reversal is processed, the balance on the stored value card is updated to 46.31. The remaining items on the order will be resent to the service bureau for authorization during pick slip generation.

Example 3: The following transactions are applied against a stored value card payment on an order.

Order Activity	Result
You enter an order and pay for the order with a stored value card payment. The balance on the stored value card is 40.31.	The system authorizes the stored value card for \$10.00. The balance on the stored value card is 30.31.
The order amount is 10.00. You send the stored value card for authorization using online authorization.	
You generate a pick slip for an order line on the order for 6.00.	The balance on the stored value card remains at 30.31.
You cancel the remaining order line in order maintenance for 4.00.	The system does not create an authorization reversal. The balance on the stored value card remains at 30.31.
You ship and bill the order line for 6.00.	The system updates the deposit amount for the authorization on the Authorization History Details screen to 6.00. The balance on the stored value card remains at 30.31.
You deposit the order line for 6.00.	The system creates a deposit record for 6.00 and updates the status of the authorization to voided. The balance on the stored value card is updated to 34.31.

#	Step
3.	The system creates an authorization reversal for the original authorization amount, not the actual amount of the reversal.
4.	The system creates a record in the Auth History SVC Reversal table for the authorization amount to reimburse.

Auth History SVC Reversal table:

Field	Description
Company	The company where you processed the stored value card authorization reversal.
Order #	The order number associated with the stored value card authorization reversal.
OPM Seq #	The order payment method sequence number associated with the stored value card payment.
AUH Seq #	The authorization history sequence number associated with the stored value card payment.
Seq#	The Auth History SVC Reversal sequence number.
Creation date	The date, in CYYMMDD format, the stored value card authorization reversal was created.
Creation time	The time, in HHMMSS format, the stored value card authorization reversal was created.
Approval date	The date, in CYYMMDD format, the stored value card authorization reversal was approved by the service bureau.
Approval time	The time, in HHMMSS format, the stored value card authorization reversal was approved by the service bureau.
Reversal amount	The amount to reimburse to the stored value card. In the case of PayPal, this is the original authorization amount.
Response	The response received from the service bureau, indicating if the authorization reversal was approved or declined.

#	Step
5.	The system creates an authorization reversal download trigger for the stored value card authorization reversal. You can view all download triggers in the IL Outbound Trigger table at the Work with Outbound Interface Transactions screen. Each authorization reversal download trigger in the IL Outbound Trigger table contains a: • <i>File code</i>: indicating the type of information to download and which IL process job processes the trigger. For authorization reversal download triggers, the <i>File code</i> is AHR. • <i>Key</i>: indicating the specific record to download. For AHR download triggers, the <i>Key</i> identifies the specific company, order number, order payment method sequence number, authorization sequence number, and authorization reversal sequence number in the SVC Authorization Reversal table. For example, the <i>Key</i> 55500006794001001001 indicates the authorization reversal information is located in company 555 for order number 6794, order payment method sequence number 001, authorization sequence number 001, and authorization reversal sequence number 001. • <i>Capture type</i>: indicating the type of activity performed against the record. AHR download triggers are always capture type A indicating the authorization reversal was created.

#	Step
6.	Looks at the <i>Authorization service</i> field defined for the stored value card payment to determine the service bureau used to process the authorization reversal.
	 Note: When the Send reversal flag is not selected for the authorization service, the system does not create an authorization reversal trigger record unless the reversal is created because the stored value card payment method is deactivated.
7.	The system looks for unprocessed AHR download triggers to process, based on the setting of the Use Activation / Reversal Batch Processing (I50) system control value. • If this system control value is selected, the system does not process the stored value card trigger records until you submit the batch process using the Transmitting Activation and Reversal Transactions (SSVC) menu option or the SVCREV periodic function (program name PFR0077). • If this system control value is unselected, the SVC Activation and SVC Reversal integration layer jobs monitor for stored value card download trigger records to process at defined intervals, based on the <i>Outbound delay time</i>. The system: • looks for AHR download triggers with the <i>File code</i> AHR and a status of ready (R). • determines which stored value card authorization reversal to download, based on the <i>Key</i> field for the authorization reversal download trigger.
8.	For each authorization reversal download trigger, the system generates a Stored Value Card Authorization Reversal Request.

#	Step
9.	The system looks at the <i>Communication type</i> field for the service bureau to determine how transactions are processed between Order Administration and the service bureau. - Integration Layer = The system sends authorization reversal transactions to the service bureau using the queues defined for the authorization reversal integration layer job. - Payment Link = Point-to-point integration. The system sends authorization reversal transactions to the service bureau using a point-to-point integration. You must define communication settings in Working with Customer Properties (PROP). The system does not use an integration layer job to communicate with the service bureau; however, the system uses the job to process authorization reversal triggers.

 Note:

This option is available for the [Customer Engagement Stored Value Card Integration](#). See [Processing Authorization Reversals Using Payment Link Communication](#).

Processing Authorization Reversals Using Payment Link Communication

If the *Communication type* field for the service bureau is Payment Link:

- Order Administration sends the authorization reversal request in the format of the other system. If you are using the [Customer Engagement Stored Value Card Integration](#), the system sends the [Customer Engagement Release Auth Request](#) to the Oracle Retail Customer Engagement system.
 - The service bureau receives the Authorization Reversal Request, processes the authorization reversal, and sends a response back to Order Administration. If you are using the [Customer Engagement Stored Value Card Integration](#), the system receives the authorization reversal response from Oracle Retail Customer Engagement in the [Customer Engagement Release Auth Response](#) message.
10. Order Administration processes the authorization reversal response accordingly. See:
- [What Happens When the Authorization Reversal is Approved?](#)
 - [What Happens When the Authorization Reversal is Declined?](#)
 - [When Communication Failures Occur](#)

 Note:

Stored value card authorization reversal responses contain a *Response code* and *Response date*, but may not contain an *Authorization code*. In this case, if the *Response code* is 100, the system updates the *Authorization code* with a dummy authorization number so that the authorization reversal is approved.

What Happens When the Authorization Reversal is Approved?

An authorization reversal is approved if the Authorization Reversal Response message contains an authorization number. In this case, the system:

- updates the associated record in the Integration Process Control table to CMP complete (if the *Communication type* field for the service bureau is Integration Layer).

- updates the associated record in the SVC Authorization Reversal table with the approval date, approval time, and reversal response.
- creates an order transaction history message indicating the authorization reversal was approved: `Reversal Has Been Approved`.
- voids the authorization history record.

**Note:**

If the stored value card authorization reversal response contains an amount, the system ignores the amount sent back and continues to use the amount from the Auth History SVC Reversal table.

You can review the stored value card authorization reversal at the [Display Authorization Reversals Screen](#). The approved reversal will have a *Response* and an *Approval date and time*.

What Happens When the Authorization Reversal is Declined?

An authorization reversal receives a declined reversal if the Authorization Reversal Response Message does not contain an authorization number. In this case, the system creates an order transaction history message indicating the authorization reversal was declined: `Reversal Has Been Rejected`.

You can review the declined stored value card authorization reversal at the [Display Authorization Reversals Screen](#). The declined reversal will have a blank *Response*, *Approval date* and *time*. You cannot resend a SVC authorization reversal request to the service bureau.

**Note:**

- Except for the order transaction history message, there is no other indication that the stored value card authorization reversal request was declined.
- Because the cancellation or deactivation amount was not reimbursed to the stored value card, the customer will not be able to use that amount on future purchases paid for against the stored value card.
- The response received from the service bureau does not display in the *Response* field on the [Display Authorization Reversals Screen](#) unless it is set up as a vendor response for the service bureau in Work with Authorization Services (WASV).

When Communication Failures Occur

Communication failures can occur if the SVC_REVRSL job is inactive, the connection between Order Administration and the service bureau is down, or the system times out before a response is received. If communication failures occur and you do not receive a response from the service bureau, the system:

- updates the associated record in the Integration Process Control table to FLD error (if the *Communication type* field for the service bureau is Integration Layer).
- does not update the associated record in the SVC Authorization Reversal table.
- does not create an order transaction history message.

You cannot resend a stored value card authorization reversal request to the service bureau.

Authorization Reversal Process During Deposits

Purpose: If the [Perform Authorization Reversal during Deposit Processing \(J20\)](#) system control value is selected, when you process deposits and the deposit amount is less than the original authorization amount, the system reimburses the stored value card the difference.

#	Step
1.	You process a deposit for an amount that is less than the original authorization amount.
2.	The system looks at the <i>Communication type</i> field for the service bureau to determine how transactions are processed between Order Administration and the service bureau. • Integration Layer = The system sends authorization reversal transactions during deposits to the service bureau using the queues defined for an integration layer job. • Payment Link = Point-to-point integration. The system sends authorization reversal transactions during deposits to the service bureau using a point-to-point integration. You must define communication settings in Working with Customer Properties (PROP). The system does not use the integration layer job to communicate with the service bureau; however, the system uses the job to process authorization reversal triggers.



Note:

This option is available for the [Customer Engagement Stored Value Card Integration](#) and this integration does not allow authorization reversals during deposits. See [Process Authorization Reversals During Deposits using Payment Link Communication](#).

Process Authorization Reversals During Deposits using Payment Link Communication

If the *Communication type* field for the service bureau is Payment Link:

- Order Administration uses the settings in Working with Customer Properties (PROP) to send the deposit request directly to the service bureau in the format of the other system.
 - The service bureau receives the deposit request, processes the deposit, and sends a response back to Order Administration.
3. When a deposit response is received, Order Administration:
- compares the *merchantReference* value in the deposit response against the *Alpha order #* field in the CC Deposit Transaction table to match a received deposit with a sent deposit record. When a match is found, the system updates the Credit Card Deposit Transaction table with the values in the deposit response message.
 - updates the status of the Integration Layer Process Control record to CMP complete (if the *Communication type* field for the service bureau is Integration Layer).
 - updates the Credit Card Deposit History table.
 - completes auto deposit processing.

Examples:

Original authorization amount is equal to deposit amount

Stored Value Card Activity	SCV J20 selected	SCV J20 unselected
Before placing an order, you inquire on the remaining balance for a stored value card.		
Stored value card balance:	53.49	53.49
You pay for the order using the stored value card as payment. The order total is 11.50.		
You authorize the stored value card and generate a pick slip for the order.		
Authorization amount:	11.50	11.50
After the stored value card is authorized, you inquire on the remaining balance for the stored value card.		
Stored value card balance:	41.99	41.99
You ship the order and bill the order. The invoice amount is 11.50.		
You process deposits. The deposit amount (11.50) equals the original authorization amount (11.50).		
Deposit amount:	11.50	11.50
Once the deposit is processed, you inquire on the remaining balance on the stored value card.		
Stored value card balance:	41.99	41.99

Original authorization amount is greater than deposit amount



Note:

The following example does not apply to PayPal reversals.

Stored Value Card Activity	SCV J20 selected	SCV J20 unselected
Before placing an order, you inquire on the remaining balance for a stored value card.		
Stored value card balance:	88.49	88.49
You pay for the order using the stored value card as payment. The order total is 11.50.		
You authorize the stored value card and generate a pick slip for the order.		
Authorization amount:	11.50	11.50
After the stored value card is authorized, you inquire on the remaining balance for the stored value card.		
Stored value card balance:	76.99	76.99

Stored Value Card Activity	SCV J20 selected	SCV J20 unselected
You void one of the items from the pick slip.		
You partial ship the remaining items on the pick slip and bill the order for the shipment amount. The invoice amount is 6.25.		
You process deposits. The original authorization amount is greater than the deposit amount.		
Deposit amount:	6.25	6.25
Reversal amount:	5.25	blank
Once the deposit is processed, you inquire on the remaining balance on the stored value card.		
Stored value card balance:	82.24	76.99

Original authorization amount is less than deposit amount



Note:

The following example does not apply to PayPal reversals.

Stored Value Card Activity	SCV J20 selected	SCV J20 unselected
Before placing an order, you inquire on the remaining balance for a stored value card.		
Stored value card balance:	82.24	82.24
You pay for the order using the stored value card as payment. The order total is 11.50.		
You authorize the stored value card and generate a pick slip for the order.		
Authorization amount:	11.50	11.50
After the stored value card is authorized, you inquire on the remaining balance for the stored value card.		
Stored value card balance:	70.74	70.74
You add an item to the order for 5.25. You authorize the stored value card and generate a pick slip for the added item.		
Authorization amount:	5.25	5.25
After the stored value card is authorized, you inquire on the remaining balance for the stored value card.		
Stored value card balance:	65.49	65.49

Stored Value Card Activity	SCV J20 selected	SCV J20 unselected
You ship the entire order and bill the order for the shipment amount. The invoice amount is 16.75.		
You process deposits.		
Deposit amount:	16.75	16.75
Once the deposit is processed, you inquire on the remaining balance on the stored value card.		
Stored value card balance:	65.49	65.49

Generating Stored Value Card Refunds

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

In this topic:

- [Stored Value Card Refunds: Credit Card Credit](#)
- [Stored Value Card Refunds: New Stored Value Card](#)
- [Changing the Type of Stored Value Card Refund Generated](#)
- [When is a New Stored Value Card Generated for a Refund?](#)
- [Consolidating New Stored Value Cards Generated for Refunds by Order](#)
- [Processing New Stored Value Cards Generated for Refunds](#)

For more information: See:

- overview and setup: [Stored Value Card Overview and Setup](#)
- activating the new stored value card for the refund amount: [Stored Value Card Purchase and Activation](#)

Stored Value Card Refunds: Credit Card Credit

If you process a return against a stored value card pay type that does not have an alternate pay type or alternate refund category defined, the system generates a credit card credit refund against the original stored value card pay type, allowing you to reimburse the refund amount to the original stored value card instead of sending a new stored value card to the customer.

Stored Value Card Refunds: New Stored Value Card

If you process a return against a stored value card pay type that has an alternate pay type or alternate refund category of stored value card defined, the system generates a new stored value card to send to the customer when you process a refund. The card is issued for the refund amount. When you process stored value card refunds, the system adds a stored value card item to the order at no charge and performs pick slip preparation. You can then follow the normal process of generating a pick slip for the stored value card item so that the card can be picked, activated, billed, and shipped to the customer.

You may wish to generate a new stored value card for the refund amount if:

- The sold to customer paid for the order using a stored value card, but has since thrown the card away. Instead of reimbursing the original stored value card on the order the refund amount, the customer has requested a new stored value card.

- The sold to customer paid for the order using multiple pay types. Instead of refunding each separate pay type on the order, the customer has requested the refund amount in the form of a stored value card.

Changing the Type of Stored Value Card Refund Generated

You can use [Working with Refunds, Writeoffs and Balances Due \(WREF\)](#) to change the type of refund that is generated for a stored value card pay type.

Credit card credit refund: If the original pay category and current pay category associated with the refund is a stored value card pay type (*pay category* Credit Card and *Card type* Stored Value), the system allows you to change the refund by entering a different refund type in the *Type* field on the [Change Refund Screen](#). You can only change the refund type to a credit card credit refund (C) or stored value card refund (V). If you change the refund type to a credit card credit refund, the system adds the refund amount to the original stored value card on the order.

Stored value card refund: The system allows you to change any refund to a stored value card refund by entering a stored value card pay type in the *Pay type* field on the Change Refund Screen.

In addition, if the original pay category and current pay category associated with the refund is a stored value card pay type (*pay category* Credit Card and *Card type* Stored Value), the system allows you to change the refund by entering a different refund type in the *Type* field on the Change Refund Screen. You can only change the refund type to a credit card credit refund (C) or stored value card refund (V). If you change the refund type to a stored value card refund, the system generates a new stored value card for the refund amount.

When is a New Stored Value Card Generated for a Refund?

If the pay type associated with the refund is set up to generate a stored value card refund, the system generates a refund for refund type V (stored value card).

The system generates a stored value card refund when:

- The alternate refund type defined for a pay type is a stored value card.
- You process a return outside the [Return Grace Period \(B52\)](#) and the [Alternate Pay Type \(B51\)](#) is a stored value card pay type.
- You change a refund to a stored value card refund (refund type V) in [Working with Refunds, Writeoffs and Balances Due \(WREF\)](#).

Alternate currency and stored value card refunds: The system can process stored value cards in the US currency only. If the order is for a currency other than US, you should change the refund to a refund type other than stored value card.

Consolidating New Stored Value Cards Generated for Refunds by Order

The system consolidates open stored value card refunds that are for the same pay type on the same order.

Example: The following activity occurs for an order. The pay type on the order has an alternate refund type of stored value card.

Activity	Results
You return order line 1 for 50.00	The system creates a stored value card refund for 50.00.
You return order line 2 for 25.00	The system updates the existing refund to 75.00.
You process stored value card refunds	The system generates a stored value card for a refund amount of 75.00.

Activity	Results
You return order line 3 for 30.00	Since the first stored value card refund for the order has been processed, the system creates a new stored value card refund for 30.00.

Multiple pay types on the same order: If the system generates a stored value card refund for different pay types on the same order, the system will not consolidate the stored value card refunds.

Example: The following activity occurs for an order. The order contains 2 pay types: cash/check for 50.00 and credit card for 55.00. Both pay types have an alternate refund type of stored value card.

Activity	Results
You return order line 1 for 50.00	The system creates a stored value card refund for 50.00. The current pay category assigned to the refund is credit card; the original pay category assigned to the refund is cash/check.
You return order line 2 for 25.00	The system creates a stored value card refund for 25.00. The current pay category assigned to the refund is credit card; the original pay category assigned to the refund is credit card.
You process stored value card refunds	The system generates 2 stored value cards: 1 for a refund amount of 50.00 and the other for a refund amount of 25.00.

 Note:

In Working with Refunds, Writeoffs and Balances Due (WREF), if you change existing refunds for an order to stored value card refunds (by entering a stored value card pay type in the *Pay type* field at the Change Refund Screen), the system will not consolidate the stored value card refunds. For example, if 2 refunds exist for an order and you change both refunds to stored value card, the system will not consolidate the 2 refunds.

Processing New Stored Value Cards Generated for Refunds

To generate stored value card refunds, select a *Bank*, select the *Generate SVC credits* field and optionally, specify the *Amount to generate* at the [Process Refunds Screen](#).

 Note:

If multiple stored value card refunds exist for an order and the first stored value card refund processed places the order on hold (due to credit checking), the system will not process the subsequent stored value card refunds since the order is now on hold.

When you process stored value card refunds, the system:

- Produces the [Stored Value Card Credit Register](#); this report displays each order and sold to customer associated with a stored value card refund and the amount of the refund.

- Writes an order transaction history message: F Stored Value Card refund created.
- Adds the [Default SVC Refund Item Number \(I73\)](#) to the order and performs pick slip preparation. This item represents the new stored value card that is sent to the customer for the amount of the processed refund. The system adds this item to the order at no charge and defaults the [Price Override Reason for SVC Refund Item \(I74\)](#) to the order line.

 Note:

The system will not generate a stored value card refund unless the stored value card refund item has available inventory. If the item does not have available inventory, the stored value card refund remains unprocessed.

- Automatically generates a pick slip for the new stored value card item added to the order if the [Default Pick Generation Template for SVC Refund Processing \(I75\)](#) system control value contains a pick slip generation template. If a pick slip generation template is not defined, you will need to advance to Streamlined Pick Slip Generation (WSPS) and select to generate a pick slip for the stored value card refund item.

Once a pick slip is generated for the stored value card item, the system goes through the regular process of assigning a number, activating, billing, and shipping the new stored value card to the sold to customer. See [Activating a Stored Value Card](#).

Once the customer receives the stored value card containing the refund amount, the card can be used on future purchases.

Importing Item/SKU and Set Data

Topics in this part: The following topics describe how to import item/SKU and set data into Order Administration from an external system.

- [Importing Item-Related Supporting Data \(SDUP\)](#) provides details on importing items/SKU information, item-related supporting table information, and set components into Order Administration.
- [Importing Set Components \(WCUP\)](#) provides details on building sets, including finished goods and variable sets.
 - [Work with Component Upload Screen \(WCUP\)](#)

Integration Layer Processes and Web Services

Purpose: This topic provides a master listing of integration layer processes and their characteristics, including whether they process inbound or outbound messages, require queues, or must be stopped and started. This topic also includes a listing of web services that do not use integration layer processes, and provides troubleshooting information for XML messages.

In this topic:

- [Integration Layer Processes](#)
- [Web Services without Integration Layer Processes](#)
- [Troubleshooting XML Messages and Integration Layer Processes](#)

For more information: See:

- *Generic Web Services* describes how to use the *CWMessageIn Web Service* to process XML messages for integration layer jobs that ordinarily use advanced queuing. This topic also describes how to use the *CWMessageIn Web Service*, which does not require an integration layer job to process the message.

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

- [Working with Integration Layer Processes \(IJCT\)](#) describes the screens you use to work with and configure integration layer jobs.
- [Advanced Queuing](#) for more information on using advanced queuing to send messages between Order Administration and an external system.
- [Working with Web Service Authentication \(WWSA\)](#) describes how to define which Order Administration web service endpoints require web service authentication.

Integration Layer Processes

This table describes:

- the integration layer processes
- their functions
- the jobs they initiate
- the messages they handle
- whether they require a queue
- whether they need to be active
- their communication type setting

Process	Function	Submitted job or program	Messages	Needs Queue?	Must be Active?	Comm type?
Order Orchestration integration	Order Administration sends and receives order information and updates. See the Order Orchestration Integration for an overview.	BROKER (ILR0022)	Sends and receives information using Order Orchestration's message formats; see Sample Order Orchestration Messages for examples.	no	yes	web service

Process	Function	Submitted job or program	Messages	Needs Queue?	Must be Active?	Comm type?
Customer history, order inquiry (inbound/outbound)	Order Administration receives a CustHistRequest for customer order history or information on a specific order, and generates a response (CWCUSTHISTOUT or CWORDEROUT). See <i>Generic Customer History API</i> for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	CUST_HIST (ILO0012)	CustHistRequest (to Order Administration) CWCUSTHISTOUT (from Order Administration) CWORDEROUT (from Order Administration)	no (if passing target of CUSTHISTIN)	no (if passing target of CUSTHISTIN)	message queue or CWMessagesIn web service
Customer download (outbound)	Order Administration generates an outbound CWCustomerDownload XML message when you create, change, or delete a customer. See <i>Generic Customer Download API</i> for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	CUST_OUT (ILR0022)	CWCustomerDownload (from Order Administration)	yes	yes	message queue

Process	Function	Submitted job or program	Messages	Needs Queue?	Must be Active?	Comm type?
Customer inquiry/search (inbound/outbound)	Order Administration receives a CWCustomeInq Request for information on one or more customers matching specific search criteria, and generates a CWCustomeInq Response. See <i>Generic Customer Inquiry (Search) API</i> for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	CUST_SRCH (ILO0022)	CWCustomeInq Request (to Order Administration) CWCustomeInq Response (from Order Administration)	no (if passing target of CWCUSTSRCH)	no (if passing target of CWCUSTSRC H)	message queue or CWMessa geIn web service
Customer API (inbound)	Order Administration receives a new customer or a change to an existing customer. See <i>Generic Customer API</i> for an overview. Note: If using the CWCustome web service, the CUSTOMR_IN IJCT job is not used. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	CUSTOMR_IN (ILO0019)	CWCustomeIn (to Order Administration)	no	no	CWCusto mer web service or CWMessa geIn web service

Process	Function	Submitted job or program	Messages	Needs Queue?	Must be Active?	Comm type?
Email (outbound)	Order Administration generates the a generic outbound XML message rather than an actual email, so that you can use the information to produce a reformatted HTML email that includes promotional material. See <i>Outbound Email API</i> . For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	EMAIL_OUT	CWEmailOut (from Order Administration)	yes	yes	message queue
Inventory download (outbound)	Order Administration sends inventory availability information to another system in the CWInventoryDownload message. See <i>Generic Inventory Download API</i> for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	INV_DOWNLOAD (ILR0022)	CWInventory Download (from Order Administration)	yes	yes	message queue

Process	Function	Submitted job or program	Messages	Needs Queue?	Must be Active?	Comm type?
Inventory inquiry (inbound/outbound)	Order Administration receives a CWInventoryInquiryRequest for inventory availability on a specific item/SKU and generates a CWInventoryInquiryResponse. See <i>Generic Inventory Inquiry API</i> for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	INV_INQUERY (ILO0013)	CWInventoryInquiry (to Order Administration) CWInventoryInquiryResponse (from Order Administration)	yes	yes	message queue or CWMessagesIn web service
Invoice Outbound (outbound)	Order Administration sends invoice information in the CWInvoiceOut message to another system, such as a retail store, financial system, or warehouse management system. See <i>Generic Invoice Download API</i> for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	INVOIC_OUT (ILR0022)	CWInvoiceOut (from Order Administration)	yes	yes	message queue

Process	Function	Submitted job or program	Messages	Needs Queue?	Must be Active?	Comm type?
Inventory transaction processor (inbound)	Order Administration receives inventory transactions in the inCreateInvXaction message and updates inventory information, such as in the Item Location and Item Warehouse tables. Any errors create Item Transaction Error records. See <i>Generic Inventory Transaction Upload</i> for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	INVTRAN_IN (ILO0008)	inCreateInvXaction (to Order Administration)	yes	yes	message queue or CWMMessageIn web service
Item Outbound (outbound)	Order Administration sends item and SKU information in the CWItemOut message to another system, such as a retail store or warehouse management system. See <i>Generic Item Download API</i> . For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	ITEM_OUT (ILR0022)	CWItemOut (from Order Administration)	yes	yes	message queue

Process	Function	Submitted job or program	Messages	Needs Queue?	Must be Active?	Comm type?
Merchandise locator (outbound/inbound)	Order Administration s ends a request for inventory information to an external system, such as Order Orchestration, and receives a response listing external warehouse and store locations where the specified item is available. See Merchandise Locator API for an overview.	N/A	LocateItems request (from Order Administration) LocateItems response (to Order Administration) Note: The CWMerchLoc request and response messages are used only to support processing the LocateItems request and response messages and the merchandise locator API, and are not themselves generic API messages.	no	no	web service

Process	Function	Submitted job or program	Messages	Needs Queue?	Must be Active?	Comm type?
Order Cleanup	Rejects orders that have been abandoned on the web storefront if, for example, the customer closes the browser window. This process uses the Time Limit for Suspended E-Commerce Orders (G43) setting to determine the number of minutes to wait before rejecting an order. Only orders of the type specified in the E-Commerce Order Type (G42) system control value are eligible for cleanup. The system generates the E-Commerce Orders Cleanup Log each time it deletes a suspended order and writes a record in the Deleted Order Table.	ORDER_CLN	This job does not generate or receive any messages and is used only to submit the order cleanup.	no	no	message queue

Process	Function	Submitted job or program	Messages	Needs Queue?	Must be Active?	Comm type?
Order processor (inbound/outbound)	Order Administration receives new orders through a generic order interface and optionally generates detailed or simple acknowledgments, as requested in the inbound order message. See <i>Generic Order Interface (Order API)</i> for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	ORDER_IN (ILO0003) If the ORDER_IN job uses a web service and does not read from or write to queues (the default setting in Order Management System 1.1 or higher), or Order Administration, there is no need to start or stop the job.	CWOrderIn (to Order Administration) CWOrderOut (from Order Administration)	no	no	CWOrderIn web service (but can specify message queue or use CWMessageIn web service)
Pick Outbound	Order Administration sends a Pick Message from Order Administration (CWPickOut) for each pick slip generated. See <i>Generic Pick Out API</i> for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	PICK_OUT (ILR0022)	CWPickOut (from Order Administration)	yes	yes	message queue

Process	Function	Submitted job or program	Messages	Needs Queue?	Must be Active?	Comm type?
Purchase Order Outbound	Order Administration sends a <i>CWPurchaseOrderOut</i> message to a warehouse management system or an EDI vendor. See <i>Generic Outbound Purchase Order API</i> . For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	PO_OUT (ILR0022)	CWPurchaseOrderOut (from Order Administration)	yes	yes	message queue
Return Inbound	Order Administration receives a <i>Return Request Message (CWReturnIn)</i> to create and process a return against a specified order line. Optionally, the process sends a <i>Return Response Message (CWReturnOut)</i> to the external system, indicating if the return processed successfully or if an error occurred. See <i>Inbound Return API</i> for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	RETURN_IN (ILO0021)	CWReturnIn (to Order Administration) CWReturnOut (from Order Administration)	no (if passing target of CWRETURN)	no (if passing target of CWRETURN)	message queue or CWMessagesIn web service

Process	Function	Submitted job or program	Messages	Needs Queue?	Must be Active?	Comm type?
Return Authorization Outbound	Order Administration s ends a <i>Return Authorization Outbound XML Message (CWReturnRAOut)</i> when a return authorization is created, changed, or deleted.	RETURN_OUT (ILR0022)	CWReturn AuthorizationOut (from Order Administration)	yes	yes	message queue
Tax Request (inbound / outbound)	Order Administration s ends a request for tax information for an order to an external system, and then receives the response. See Use Generic Tax XML Interface (J10) and the Vertex Interface .	TAX_INT This process does not submit a job; it is used to determine the XML message format and the queue used to transmit the message. You do not need to start or end this job.	CWTaxRequest (from Order Administration) CWTaxResponse (to Order Administration)	no	no	web service
Vendor Outbound (outbound)	Order Administration s ends a CWVendorOut message to another system, such as a retail store or warehouse management system. See <i>Generic Vendor Download API</i> for more information. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	VENDOR_OUT (ILR0022)	CWVendorOut (from Order Administration)	yes	yes	message queue

Process	Function	Submitted job or program	Messages	Needs Queue?	Must be Active?	Comm type?
Workflow processing (inbound)	Order Administration receives the CWWorkflow XML message from an outside source and creates a tickler, based on the information in the message. This process does not process any message other than CWWorkflow. See Workflow Management Overview and Setup and WF (Remote Workflow) Event Processing.	WORKFLOW (ILO0002)	CWWorkflow (to Order Administration)	yes	yes	message queue or CWMessageIn web service

Web Services without Integration Layer Processes

The following web services allow you to process XML messages directly without using a process at the [Work with Integration Layer Process Screen](#).

Web Service	Inbound Message	Outbound Message	For More Information
CWOrderIn	<i>Inbound Order XML Message (CWORDERIN)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	<i>Detailed Order XML Response (CWORDEROUT), or Order Acknowledgement XML Message (CWORDEROUT)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	<i>Generic Order Interface (Order API)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Web Service	Inbound Message	Outbound Message	For More Information
CWCustomer	<i>Inbound Customer Message (CWCustomerIn)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	<i>Outbound Customer Response Message (CWCustomerOut)</i>	<i>Generic Customer API</i>
CWReceiptIn	<i>PO Receipt In XML Message (CWReceiptIn)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	none	<i>Purchase Order Receipt In API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
CWPickIn	<i>CWPickIn XML Message</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	none	<i>Generic Pick In API (Shipments, Voids, and Backorders)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
CWServiceIn	<i>Order Transaction History Message (CWOrderTransactionHistory)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	none	<i>Generic Order Transaction History API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
	<i>Order Line History In Message (CWOrdLnHstIn)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	none	<i>Order Line History In API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
	<i>Item Availability Request XML Message (CWItemAvailabilityWeb)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	<i>Availability Response XML Message (CWItemAvailabilityResponseWeb)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	<i>Item Availability API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Web Service	Inbound Message	Outbound Message	For More Information
CWMessageIn this web service works with any of the integration layer processes set up through Working with Integration Layer Processes (IJCT); see CWMessageIn Web Service for more information. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	<i>E-Commerce Cancel Request Message (CWCcancel)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	none	E-Commerce Cancel Process
	<i>E-Commerce Catalog Request Message (CWCatRequest)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	<i>E-Commerce Catalog Request Response Message (CWCatreqResponse)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	<i>E-Commerce Catalog Requests</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
	<i>CWProcessIn Message</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	none	<i>Using the CWProcessIn Message to Start a Periodic Process</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
	<i>Inbound Customer Search Message (CWCcustomerInqRequest)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	<i>Outbound Customer Search Response (CWCcustomerInqResponse)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	queue not required if target is CWCUSTSRCH; see <i>Generic Customer Inquiry (Search) API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
	<i>Inbound Customer Message (CWCcustomerIn)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	<i>Outbound Customer Response Message (CWCcustomerOut)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	queue not required if type is CWCcustomerIn; see <i>Generic Customer API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Web Service	Inbound Message	Outbound Message	For More Information
	<i>Customer History Request XML Message (CWCustHistIn)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	<i>Customer History Response XML Message (CWCustHistOut) or Detailed Order Inquiry Response XML Message (CWORDEROUT)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	queue not required if target is CUSTHISTIN; see <i>Generic Customer History API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
	<i>Email XML Message (CWEmail)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	none	<i>Email Repository Overview</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
	<i>Inventory Inquiry Request XML Message (CWInventoryInquiry)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	<i>Inventory Inquiry Response XML Message (CWInventoryInquiryResponse)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	<i>Generic Inventory Inquiry API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
	<i>Inventory Transaction Upload XML Message (inCreateInvXaction)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	none	<i>Generic Inventory Transaction Upload</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Web Service	Inbound Message	Outbound Message	For More Information
CWMessageIn continued	Inbound Order XML Message (CWORDERIN) For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Detailed Order XML Response (CWORDEROUT) or Order Acknowledgement XML Message (CWORDEROUT) For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Generic Order Interface (Order API) For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
	Return Request Message (CWReturnIn) For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Return Response Message (CWReturnOut) For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	queue not required if target is CWRETURNIN; see <i>Inbound Return API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
	Generic Workflow XML Message (CWWorkflow)		Workflow Management Overview and Setup and WF (Remote Workflow) Event Processing

Troubleshooting XML Messages and Integration Layer Processes

See also [Using the JOBCLN Function to Resolve Job Status Across Servers](#).

Question	Possible Solution
What are some reasons why inbound messages might not be processed?	If the process uses a JMS provider (advanced queuing): - Is the queue name correct? (Note: Queue names are case-sensitive.) - Is the Enabled flag selected for the process queue at the Integration Layer Process Queue Screen? - Did the server end unexpectedly while the process was active? If so, the Work with Integration Layer Process Screen might display a Status of Active even if the process is no longer running. See Starting or Ending a Process for information on how to reset the status.
Do you need to use a JMS provider (advanced queuing) for integration layer processes or e-commerce?	You can use the <i>Generic Web Services</i> to send XML messages if you prefer not to use advanced queuing. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Question	Possible Solution
What is the purpose of an integration layer job that doesn't need to be stopped or started?	Some possible purposes: - To specify the version of an outbound XML message - To specify the queue where an interactive process writes an outbound message
Are all integration layer processes listed at the Work with Integration Layer Process Screen?	If you have hidden a process, it is not listed. See Hiding an Integration Layer Process .
How can I track the messages processed?	See Order Administration Application Logs for information on the logs you can use to track XML messages.
How can the version number of an XML message be higher than the Order Administration release number?	XML version numbers do not increase in sync with the current Order Administration release number; instead, the XML version number increases each time new elements or attributes are added to the message, which can occur multiple times between major Order Administration releases. See XML Versions for a discussion.
Does the inbound XML version number matter?	The inbound XML version number is informational, indicating when new elements or attributes are added. Even if the inbound XML version number is lower than the one in which the new elements or attributes were added, the integration layer job can still process the inbound message if the elements or attributes were added prior to the current Order Administration release. See XML Versions for a discussion.
Is it necessary to start and stop a process manually?	See Scheduling Jobs and Additional Interface (INT) Periodic Functions for more information on how to schedule a periodic function and for a list of the periodic functions used to start and stop the integration layer jobs.
Where can I find DTDs and schemas, for XML messages?	See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Merchandise Locator API

Purpose: Use the merchandise locator integration to request current availability information about an item/SKU in retail stores within a geographic search area or in external warehouses.

The merchandise locator search finds locations where the item is available for pickup, as well as indicating whether the item is available for shipment from a location. Your search specifies the requested quantity, and Order Administration uses the ProductAvailability request and response to communicate with Order Orchestration.

Does not create orders: The merchandise locator search is an inquiry only, and does not create or update an order. See the [Order Orchestration Integration](#) for information on submitting a brokered backorder (delivery or ship-for-pickup), store pickup, or ship-for-pickup order to Order Orchestration.

For more information: See:

- [Order Orchestration Integration Overview](#) for background on integration between Order Orchestration and Order Administration
- [Order Orchestration Configuration](#) for required setup in Order Administration

- the Order Orchestration Web Services Guide on <https://support.oracle.com> (ID 2953017.1) for details on the LocateItems request and response messages or the ProductAvailability request and response messages, your options in configuring merchandise locator searching, and details on logging and troubleshooting in Order Orchestration

In this topic:

- [Merchandise Locator Process Overview](#)
 - [Searching for Pickup Locations and Shipment Availability](#)
 - [Merchandise Locator for Different Types of Items](#)
 - [Merchandise Locator Troubleshooting](#)
- [Merchandise Locator Search Window \(Searching for an Item\)](#)
- [Merchandise Locator Search Results Screen](#)
- [Display Merchandise Locator Search Result Screen](#)

Merchandise Locator Process Overview**Searching for Pickup Locations and Shipment Availability**

Overview: A typical process of inquiring on locations where an item is available for pickup, as well as whether the item is available for shipment from a location, is described below.

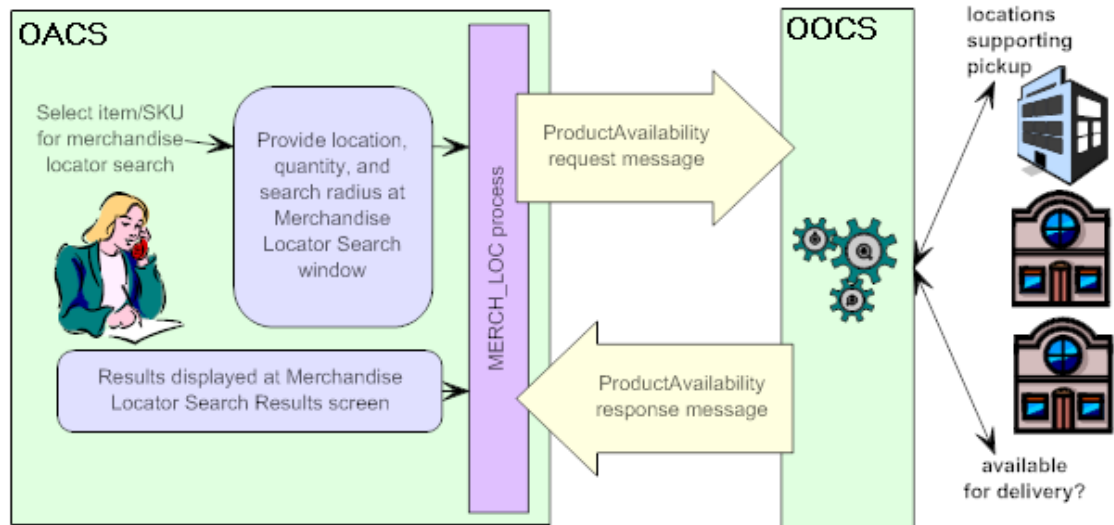
1. A customer wants to know if an item/SKU is available for pickup at a nearby store or available for shipment from a store location. You select the item/SKU for merchandise locator inquiry. This option is available in order entry, order maintenance, and at the [Display Item Availability Screen](#).
2. You advance to the [Merchandise Locator Search Window \(Searching for an Item\)](#), where you provide or confirm the customer's geographic location, the requested quantity of the item, and the radius to search within (for example, search all stores within 25 miles of the customer's home).

**Note:**

Order Orchestration supports merchandise locator searches only in the U.S. and Canada.

3. In the background, the MERCH_LOC process:
 - Generates the ProductAvailability request message and sends it to Order Orchestration. Order Orchestration checks the availability of the item in stores that stock the item/SKU within the search area, as well as whether the item is available for shipment at any store locations within the same search area.
 - Receives the ProductAvailability response returned by Order Orchestration. This message lists:
 - the item/SKU's current or estimated availability in each searched location that stocks the item for pickup
 - an indicator of whether the requested quantity of the item/SKU is available for shipment within the search area
4. You advance to the [Merchandise Locator Search Results Screen](#), displaying the item/SKU's availability for pickup in each of the locations, including information on any open

purchase orders. The screen also indicates whether the requested quantity of the item/SKU is available for delivery from a store within the same search area.



How does Order Orchestration select the locations to include?

- Locations eligible to fulfill pickup orders:
 - Only store locations flagged as *Pickup available* can be included in the search results displayed at the [Merchandise Locator Search Results Screen](#).
 - Order Orchestration uses any probability rules you have set up to determine whether to include locations in the results, and the available quantity to indicate. For example, you might set up a probability rule for certain locations indicating to exclude them if the available quantity falls below 5 units, or to reduce the available quantity returned in the response message by 10%.

Results displayed: For each location included in the search results as eligible for a pickup order, the [Merchandise Locator Search Results Screen](#) indicates:

- the available quantity, next purchase order date, and next purchase order quantity
- whether the store location will ship the item for pickup in another store location
- the name, address, and phone number of the location
- the distance from the search address:
 - * locations are sorted in ascending order by distance (closest location listed first)
 - * locations that are not flagged to *Use Proximity Locator* are listed without a distance

 Note:

- Any locations associated in Order Orchestration with your Order Administration system are excluded from the results, regardless of whether there is a corresponding warehouse record in Order Administration.
- If a location that stocks the item and is within the search radius is flagged in Order Orchestration as *Backorder Available*, it is returned in the search results even if it does not have the item available. In this case, the *Pickup avail qty* listed can be blank, or can be a negative quantity.
- If there are locations that stock the item and are within the search radius, but none have the full requested quantity available (and are not flagged as *Backorder Available*), the [Merchandise Locator Search Results Screen](#) displays the locations, but does not indicate the *Dist*, *Pickup avail qty*, *Open PO qty*, or *Next PO date*. This situation could occur if, for example, the customer requests 5 units, and none of the locations have more than 4 units available. To display the full information for the displayed locations, search again with a lower *Search quantity*.

- Locations eligible to fulfill delivery orders: Only store locations flagged as *Shipping available* are eligible to fulfill a delivery order. Also, Order Orchestration:
 - uses any probability rules you have set up to determine whether to include locations in the results, and the available quantity. For example, you might set up a probability rule for certain locations indicating to exclude them if the available quantity falls below 5 units, or to reduce the available quantity indicated in the response message by 10%.
 - does not exclude locations flagged as *Backorder available*, even if the available quantity in the location is less than the requested quantity.
 - restricts eligible locations to a fulfillment zone based on the search address, if configured in Order Orchestration.
 - excludes locations associated with Order Administration's system in Order Orchestration, if the *Disallow shipping within same system* option is selected for the Order Administration system in Order Orchestration.
 - excludes locations that have already been assigned the *Maximum Daily Orders*, if *Use Maximum Order Limits* preference is selected in Order Orchestration.

Results displayed: If the results indicate that one or more locations could deliver the requested quantity, the [Merchandise Locator Search Results Screen](#) indicates Delivery From Store Is Available; otherwise, the screen indicates Delivery From Store Is Not Available. This message might be displayed even if one or more locations could ship the requested quantity, even if these locations are not displayed in the search results.

 Note:

The delivery evaluation uses the same search radius as the pickup evaluation. To determine whether the item can be shipped without restricting the results to locations within driving distance of the customer, retry the search with a higher search radius.

For more information: See the [Merchandise Locator Search Results Screen](#) and the Order Administration Web Services Guide on <https://support.oracle.com> (ID 2953017.1) for more information on the search results.

ProductAvailability request not used when creating a pickup order: Unlike the merchandise locator search described here, when you create a pickup order in order entry by selecting the Store Pickup option, Order Administration uses the `LocateItems` request message to search for store locations where the customer can pick up the order, regardless of the `CW_LOCATE_MESSAGE_VERSION` specified in [Working with Customer Properties \(PROP\)](#).

Merchandise Locator for Different Types of Items

Merchandise locator searches are not useful for the following types of items:

- membership item
- subscription item
- component of a set (although you can include the main set item)

Also, an item must have its [OROB eligible](#) flag selected in order to be eligible for a merchandise locator search. Typically, you would use this flag to exclude inappropriate items, such as gift cards or any other items that are not available in external store locations.



Note:

The restriction against set components applies only if the item is added to the order as a component of a set. If you enter the item as a separate order line, merchandise locator searching is still available.

Merchandise Locator Troubleshooting

Problem	Possible Explanation or Solution
A location that stocks the requested item is not listed at the Merchandise Locator Search Results Screen	The location might: • not have the <i>Pickup available</i> flag selected in Order Orchestration • be excluded because of probability rules • be outside of the search radius
The merchandise locator request message is producing invalid XML	Check that text fields included in the message, such as the item or SKU description, do not include any special characters. For example, the carat (^) and the pipe symbol () are not valid characters in an XML message.

Problem	Possible Explanation or Solution
The Merchandise Locator Search Results Screen displays the error: Availability information is not accessible at this time	Could occur because: - communications between Order Administration and Order Orchestration are not active - Order Orchestration could not identify the search location based on the information sent in the search request (for example, it has no record of the provided zip code). See the Order Orchestration Web Services Guide https://support.oracle.com (ID 2953017.1) for more information. - None of the locations within the search area have the item/SKU in stock. You can select Search again to change the search location or distance to search within. - None of the locations within the search area stock the item/SKU. You can select Search again to change the search location or distance to search within. - The customer address information provided in the merchandise locator request was invalid or incomplete. This could occur if, for example, you entered a Canadian address, but the database used to identify customer locations in Order Orchestration includes only U.S. addresses.
The Merchandise Locator Search Results Screen displays the error Item/Sku not Merchandise Locator eligible	The item's <i>OROB eligible</i> flag is unselected, so Order Orchestration would not be able to identify the item.
The Merchandise Locator Search Results Screen displays the error FAILED: 1002 - Invalid item (system product), item (ROBOT) does not exi	The selected item is <i>OROB eligible</i> , but has not yet been created in Order Orchestration.
The Merchandise Locator Search Results Screen does not indicate the <i>Dist, Pickup avail qty, Open PO qty, or Next PO date</i>	This situation can occur if there are locations that stock the item and are within the search radius, but none have the full requested quantity available (and are not flagged as <i>Backorder Available</i>): for example, the customer requests 5 units, and none of the locations have more than 4 units available. To display the full information for the displayed locations, search again with a lower <i>Search quantity</i> .
The Merchandise Locator Search Results Screen lists a location with no quantity, or with a negative quantity	This situation can occur if a location that stocks the item and is within the search radius is flagged in Order Orchestration as <i>Backorder Available</i> .

Merchandise Locator Search Window (Searching for an Item)

Purpose: Use this window to check availability for an item across external locations, such as retail stores, typically through Order Orchestration. To search, you need to specify the customer's location, either by city and state or postal code, the search radius, and a search quantity.

Address defaults: If you advance to this window in order entry or order maintenance, the customer's address information defaults. Also, if you have overridden the address information in order entry or order maintenance, the system continues to default the override information until you are working with a different customer. For example, if you perform a search using the

customer's work address for an item/SKU, and then select another item/SKU for a search while working with the same order, the customer's work address defaults.

How to display this window: Select Merch locator for an item at the:

- [Work with Order Lines Screen \(Adding Items to the Order\)](#)
- [SKU Scan Screen](#)
- [Scan Order Lines Screen](#)
- [Display Item Availability Screen](#)

**Note:**

This option is available only if:

- The [Use Merchandise Locator \(I38\)](#) system control value is selected. Otherwise, the screen displays an error message: `Merchandise Locator is not enabled`. Also, merchandise locator searching is not available for all items; see [Merchandise Locator for Different Types of Items](#) for a listing of items that are not eligible.
- You have not already selected a quantity of the item to add to the current order at the Display Item Availability Screen in order entry. Otherwise, the screen displays an error message: `Option not allowed since item already selected`.

**Important:**

Order Orchestration supports merchandise locator searches only within the U.S. and Canada.

The merchandise locator search is an inquiry only, and does not create or update an order. See the [Order Orchestration Integration](#) for information on submitting a brokered backorder, store pickup, or ship-for-pickup order to Order Orchestration.

Field	Description
Item	The item selected at the previous screen. The SKU information, if any, is to the right. <i>Item code: alphanumeric, 12 positions; display-only.</i> <i>SKU: alphanumeric, three 4-position fields; display-only.</i>
Item description	The description of the item. Even if the item has SKUs, the item description is displayed. <i>Alphanumeric, 120 positions; display-only.</i>

Field	Description
Postal code	 Note: If you advanced to this window from order entry or order maintenance, the customer's address information defaults. The customer's U.S. zip or Canadian postal code, to serve as the central point for the search radius. For example, if the <i>Search within</i> field is set to 25 miles, the search includes stores within 25 miles of this postal code. The search radius applies only to locations that use proximity rules. You might set up Order Orchestration so that proximity rules apply to stores only and not warehouses.  Note: Your entry in this field is not validated against the Zip/City/State table. <i>Alphanumeric, 10 positions; required if you do not enter a city and state.</i>
Address	The customer's street address, to serve as the central point for the search radius. The search radius applies only to locations that use proximity rules. You might set up Order Orchestration so that proximity rules apply to stores only and not warehouses. <i>Alphanumeric, 32 positions; optional.</i>
City	The customer's city, to serve as the central point for the search radius. The search radius applies only to locations that use proximity rules. You might set up Order Orchestration so that proximity rules apply to stores only and not warehouses. <i>Alphanumeric, 25 positions; required if you do not enter a postal code.</i>
State	The customer's U.S. state or Canadian province, to identify the location of the city. The search radius applies only to locations that use proximity rules. You might set up Order Orchestration so that proximity rules apply to stores only and not warehouses. <i>Alphanumeric, 2 positions; required if do not enter a postal code.</i>

Field	Description
Country	The customer's country. The country defaults from the customer address if you advanced to this window from order entry or order maintenance; otherwise, it defaults from the vDefault Country for Customer Address (B17) system control value. Defined in and validated against the Country table; see Setting Up the Country Table (WCTY) for more information. The search radius applies only to locations that use proximity rules. You might set up Order Orchestration so that proximity rules apply to stores only and not warehouses. <i>Alphanumeric, 2 positions; required.</i>
Search quantity	The requested quantity of the item. Defaults to 1. <i>Numeric, 7 positions; required.</i>
Search within	Indicates the search radius, in miles or kilometers, to search within for the selected item. The search radius defaults from the Default Search Within Radius (I40) system control value, but you can override it.

 Note:

- The search radius applies only to locations that use proximity rules. You might set up Order Orchestration so that proximity rules apply to stores only and not warehouses.
- The distance unit of measure (miles or kilometers) specified with the Merchandise Locator Distance Measurement (I39) system control value is displayed to the right.
- Typically, a search for a delivery location can use a broader search radius than a search for a pickup location, which is generally within driving distance. To see if the item is available for delivery as opposed to pickup, you might search twice, specifying a different search radius when determining if the item is available for delivery.

Numeric, 5 positions; required.

Completing this window:

- If they have not already defaulted, indicate the postal code or the city and state to serve as the central point for the search radius.
- Optionally, override the *Search quantity*.
- Optionally, override the *Search within* radius to a different distance.

- Click OK. The system generates the ProductAvailability request message. See the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for more information.

When the system receives the response message, you advance to the [Merchandise Locator Search Results Screen](#).

Merchandise Locator Search Results Screen

Purpose: Use this screen to review an item's availability in external locations and the details about the external location.

The *Ship for Pickup* and *Pickup Available Quantity* fields indicate whether the store location supports store pickup orders, ship-for-pickup orders, or both.

- If the *Ship for Pickup* field is set to Y and a quantity is defined in the *Pickup Available Quantity* field, the store location supports both ship-for-pickup orders and store pickup orders.
- If the *Ship for Pickup* field is set to Y and the *Pickup Available Quantity* field is blank, the store location supports ship-for-pickup orders but not store pickup orders.
- If the *Ship for Pickup* field is set to N and a quantity is defined in the *Pickup Available Quantity* field, the store location supports store pickup orders but not ship-for-pickup orders.
- If the *Ship for Pickup* field is set to N and the *Pickup Available Quantity* field is blank, the store location does not support ship-for-pickup orders or store pickup orders.

If you advanced to this screen during Order Entry and the *Ship for Pickup* field is set to Y for a store, you can select Ship for Pickup to convert the order to a ship-for-pickup order; in this situation, the system updates the one-time ship to address on the order to the store's name and address and sends a broker backorder for the ship-for-pickup order to the Order Orchestration for fulfillment assignment. See [Brokered Backorders](#) for processing details.

How to display this screen: Complete the [Merchandise Locator Search Window \(Searching for an Item\)](#) and click OK.

Troubleshooting: See [Merchandise Locator Troubleshooting](#).

For more information: See the Order Administration Web Services Guide on <https://support.oracle.com> (ID 2953017.1) for an example of the actual response messages used to populate the information on this screen.



Note:

You cannot submit an order to Order Orchestration through this screen. See the [Order Orchestration Integration](#) for information on submitting a brokered backorder, store pickup, or ship-for-pickup order to Order Orchestration.

Field	Description
Locations closest to	The address information provided at the Merchandise Locator Search Window (Searching for an Item). This information could be just a postal code or a city and state, or could include additional information such as the street address. The information is truncated if it exceeds the space allowed on this screen. The search radius applies only to locations that use proximity rules. You might set up Order Orchestration so that proximity rules apply to stores only and not warehouses. <i>Alphanumeric, 55 positions; display-only.</i>
Radius	The Search within radius selected at the Merchandise Locator Search Window (Searching for an Item). The setting of the Merchandise Locator Distance Measurement (I39) (miles or kilometers) is to the right. The search radius applies only to locations that use proximity rules. You might set up Order Orchestration so that proximity rules apply to stores only and not warehouses. <i>Numeric, 5 positions; display-only.</i>
Location types	Always set to All (both stores and warehouses). <i>Alphanumeric, 3 positions; display-only.</i>
Item	The item selected for search. The SKU information, if any, is to the right. <i>Item code: alphanumeric, 12 positions; display-only.</i> <i>SKU: alphanumeric, three 4-position fields; display-only.</i>
Item description	The description of the item. Even if the item has SKUs, the item description is displayed. <i>Alphanumeric, 120 positions; display-only.</i>
Delivery availability (unlabeled field to the right of the item description)	If the results indicate that one or more locations could deliver the requested quantity, the Merchandise Locator Search Results Screen indicates Delivery From Store Is Available; otherwise, the screen indicates Delivery From Store Is Not Available. This message might be displayed even if one or more locations could ship the requested quantity, even if these locations are not displayed in the search results.

Field	Description
Dist	Each location in the search results where the customer could pick up the item is displayed below. Locations are sorted by distance (nearest to farthest away). The number of miles or kilometers, based on the Merchandise Locator Distance Measurement (I39), from the search location. This distance might be approximate, depending on the actual criteria used to search (for example, postal code or city), and does not represent an actual driving distance. No distance is displayed if the location is not set up in Order Orchestration to use proximity rules. In this situation, the location is always considered to be within the specified search radius. Also, no distance is displayed if the store location and the search location are in the same zip or postal code. The distance is rounded down when determining whether to include the location in the search results. For example, if the Search radius is 10 miles, and the location is 10.84 miles away, the location is included in the results. The distance is shown if the location is shown. The location is shown when: • Pickup qty > 0 and store flagged as pickup even though not ship for pickup • Pick qty = 0, store not flagged as pickup available but store is flagged for ship for pickup Location is not shown if no inventory and not flagged as ship for pickup. <i>Numeric, 7 positions with a 2-place decimal.</i>
Ship for Pickup	Indicates whether the store location is available for selection as a destination for a ship-for-pickup order. This is from the <i>Ship for Pickup</i> setting for the store location in the Work with Store Cross Reference (WSCR) menu option. Y = the store location is available for selection as a destination for a ship-for-pickup order. During Order Entry, if you select Ship for Pickup for the store location, the system updates the ship to address on the order to the address defined for the store location and converts the order to a ship-for-pickup order. See Brokered Backorders for processing details. N = the store location is not available for selection as a destination for a ship-for-pickup order. <i>Alphanumeric, 1 position; display-only.</i>

Field	Description
Location	The description and address of the location where the item/SKU is available, and can include: • description • city • state • postal code • country This information is provided directly from Order Orchestration, and is not derived from the Store Cross Reference table in Order Administration.

 Note:

Searching the locations displayed on the screen based on location name is not currently implemented.

Description: alphanumeric, 40 positions; display-only.

City: alphanumeric, 25 positions; display-only.

State: alphanumeric, 2 positions; display-only.

Postal code: alphanumeric, 10 positions; display-only.

Country: alphanumeric, 3 positions; display-only.

Field	Description
Pickup avail qty	The quantity of the item/SKU reported in the response message as available for pickup in this location. Depending on your settings within Order Orchestration, this quantity may be approximate, or calculated based on probability rules.

 Note:

- If a location that stocks the item and is within the search radius is flagged in Order Orchestration as *Backorder Available*, it is returned in the search results even if it does not have the item available. In this case, the *Pickup avail qty* listed can be blank, or can be a negative quantity.
- If there are locations that stock the item and are within the search radius, but none have the full requested quantity available (and are not flagged as *Backorder Available*), the [Merchandise Locator Search Results Screen](#) displays the locations, but does not indicate the *Dist*, *Pickup avail qty*, *Open PO qty*, or *Next PO date*. This situation could occur if, for example, the customer requests 5 units, and none of the locations have more than 4 units available. To display the full information for the displayed locations, search again with a lower *Search quantity*.

Numeric, 7 positions; display-only.

Field	Description
Open PO qty	The quantity of the item/SKU reported on open purchase orders for this location; depends on how the external system calculates the open PO quantity.

 Note:

If there are locations that stock the item and are within the search radius, but none have the full requested quantity available (and are not flagged as *Backorder Available*), the [Merchandise Locator Search Results Screen](#) displays the locations, but does not indicate the *Dist*, *Pickup avail qty*, *Open PO qty*, or *Next PO date*. This situation could occur if, for example, the customer requests 5 units, and none of the locations have more than 4 units available. To display the full information for the displayed locations, search again with a lower *Search quantity*.

Next PO date	<i>Numeric, 7 positions; display-only.</i> The date when the next purchase order for this item/SKU is due to be received at this location; depends on how the external system calculates the next PO date.

 Note:

If there are locations that stock the item and are within the search radius, but none have the full requested quantity available (and are not flagged as *Backorder Available*), the [Merchandise Locator Search Results Screen](#) displays the locations, but does not indicate the *Dist*, *Pickup avail qty*, *Open PO qty*, or *Next PO date*. This situation could occur if, for example, the customer requests 5 units, and none of the locations have more than 4 units available. To display the full information for the displayed locations, search again with a lower *Search quantity*.

Numeric, 6 positions (user date format); display-only.

Option	Procedure
Display a location	Select Display for a location to advance to the Display Merchandise Locator Search Result Screen .

Option	Procedure
Select the store location as the pickup location for a ship-for-pickup order	Select Ship for Pickup for a location. The system: - updates the one-time ship to name and address on the order to the selected store location and converts the order to a ship-for-pickup order. - sends a broker backorder for the ship-for-pickup order to the Order Orchestration for fulfillment assignment. See Brokered Backorders for processing details.
Note: This option is available only if you advanced to this	

Option	Procedure
	s s c r e e n d u r i n g O r d e r E n t r y .

Search again Select Search again to return to the [Merchandise Locator Search Window \(Searching for an Item\)](#).

Display Merchandise Locator Search Result Screen

Purpose: Use this screen to review additional details about a location where the customer might be able to pick up the item. You cannot make any changes on this screen.

The address components, such as postal code, country, and phone number, are provided by external systems and might not be formatted or validated at this screen the same way as they are for data stored in Order Administration.

How to display this screen: Select Display for a location at the [Merchandise Locator Search Results Screen](#).

Field	Description
Item	The item selected for search. The SKU information, if any, is to the right. <i>Item code: alphanumeric, 12 positions; display-only.</i> <i>SKU: alphanumeric, three 4-position fields; display-only.</i>
Description	The description of the item. Even if the item has SKUs, the item description is displayed. <i>Alphanumeric, 120 positions; display-only.</i>

Field	Description
Loc type	Always set to All (both stores and warehouses).

 Note:

Not included if the CW_LOCATE_MESSAGE_VERSION in Working with Customer Properties (PROP) specifies a message version of 5.0 or higher.

Distance

Alphanumeric, 3 positions; display-only.

The number of miles or kilometers, based on the Merchandise Locator Distance Measurement (I39), from the search location. This distance might be approximate, depending on the actual criteria used to search (for example, postal code or city), and does not represent an actual driving distance. The setting of the Merchandise Locator Distance Measurement (I39) (miles or kilometers) is to the right.

The distance displayed is .00 if the location is not set up in Order Orchestration to use proximity rules. In this situation, the location is always considered to be within the specified search radius.

Numeric, 7 positions with a 2-place decimal.

Location

The description and address of the location where the item/SKU is available, consisting of:

- description (the *Name* from Order Orchestration)
- street address (up to four lines)
- city
- state
- postal code
- country
- phone number (does not include the extension or the fax number)

This information is provided directly from Order Orchestration, and is not derived from the Store Cross Reference table in Order Administration.

Description: alphanumeric, 40 positions; display-only.

Street: alphanumeric, 40 positions each; display-only.

City: alphanumeric, 25 positions; display-only.

State: alphanumeric, 2 positions; display-only.

Postal code: alphanumeric, 10 positions; display-only.

Country: alphanumeric, 3 positions; display-only.

Phone number: alphanumeric, 14 positions; display-only.

Field	Description
Available	The quantity of the item/SKU reported in the response message as available for pickup in this location. Depending on your settings within Order Orchestration, this quantity may be approximate, or calculated based on probability rules.

 Note:

- If a location that stocks the item and is within the search radius is flagged in Order Orchestration as *Backorder Available*, it is returned in the search results even if it does not have the item available. In this case, the *Pickup avail qty* listed can be blank, or can be a negative quantity.
- If there are locations that stock the item and are within the search radius, but none have the full requested quantity available (and are not flagged as *Backorder Available*), the [Merchandise Locator Search Results Screen](#) displays the locations, but does not indicate the *Dist*, *Pickup avail qty*, *Open PO qty*, or *Next PO date*. This situation could occur if, for example, the customer requests 5 units, and none of the locations have more than 4 units available. To display the full information for the displayed locations, search again with a lower *Search quantity*.

Open PO

Numeric, 7 positions; display-only.

The quantity of the item/SKU reported on open purchase orders for this location; depends on how the external system calculates the open PO quantity.

If there are locations that stock the item and are within the search radius, but none have the full requested quantity available (and are not flagged as *Backorder Available*), the [Merchandise Locator Search Results Screen](#) displays the locations, but does not indicate the *Dist*, *Pickup avail qty*, *Open PO qty*, or *Next PO date*. This situation could occur if, for example, the customer requests 5 units, and none of the locations have more than 4 units available. To display the full information for the displayed locations, search again with a lower *Search quantity*.

Numeric, 7 positions; display-only.

Field	Description
Next PO	The date when the next purchase order for this item/SKU is due to be received at this location; depends on how the external system calculates the next PO date. If there are locations that stock the item and are within the search radius, but none have the full requested quantity available (and are not flagged as <i>Backorder Available</i>), the Merchandise Locator Search Results Screen displays the locations, but does not indicate the <i>Dist</i>, <i>Pickup avail qty</i>, <i>Open PO qty</i>, or <i>Next PO date</i>. This situation could occur if, for example, the customer requests 5 units, and none of the locations have more than 4 units available. To display the full information for the displayed locations, search again with a lower <i>Search quantity</i>. <i>Numeric, 6 positions (user date format); display-only.</i>

Brokered Backorders

Purpose: If the [Send B/O to OROB \(K08\)](#) system control value is selected, you can use the [Order Orchestration Integration](#) to send backordered order lines to Order Orchestration for fulfillment.

- If the [Use OROB for Fulfillment Assignment \(M31\)](#) system control value is unselected, the system sends eligible backordered items to Order Orchestration for fulfillment. Order Orchestration will choose the best store location to fulfill and ship the item to the customer. Items that are in stock follow normal reservation and fulfillment processing.
- If the [Use OROB for Fulfillment Assignment \(M31\)](#) system control value is selected, the system bypasses reservation and places all eligible items on backorder, even if the item is available in an Order Administration warehouse. Order Orchestration will choose the best store location or Order Administration location to fulfill and ship the item to the customer.
- If the [Use OROB for Ship for Pickup Fulfillment Assignment \(M34\)](#) system control value is set to ALWAYS, the system bypasses reservation in order to send eligible items on a ship-for-pickup order to Order Orchestration for fulfillment assignment. In this situation, the fulfilling location may be a store location or an Order Administration warehouse and the merchandise is shipped to the customer's selected store for pickup. See [Creating a Ship-for-Pickup Order in Order Administration](#) for more information on how to create a ship-for-pickup order.



Note:

If the item is flagged as a active PO item the system does not submit it to Order Orchestration for fulfillment using the standard process described here; instead, it uses the process described under [Enterprise Order Integration \(Future Receipts and Active PO/Pre-Order Processing\)](#).

When using Order Orchestration for fulfillment assignment, the fulfilling location can be a store location or an OACS warehouse location. In addition, for ship-for-pickup orders, the fulfilling location ships the order to the customer's selected store for pickup.

In this topic:

- [Brokered Backorder Processing Overview](#)

- [Brokered Backorder Fulfillment: Initial Order Creation](#)
- [Fulfillment Process: After Order Creation and Status Updates](#)
- [Rules for Submitting Backorders to Order Orchestration](#)
 - [BROKER Periodic Function](#)
- [Brokering Items with Soldout Control Codes](#)
- [Things to Note About Brokered Backorders](#)

Brokered Backorder Processing Overview

Order Orchestration assignment: Assigning a backordered item to Order Orchestration can occur through:

- order entry or order API: When you create an order that includes a backordered line, Order Administration assigns the line, if eligible, to Order Orchestration for fulfillment, and withholds it from normal fulfillment processing within Order Administration.

Note:

- If the Use OROB for Fulfillment Assignment (M31) system control value is selected, the system bypasses reservation for all eligible items on an order and places them on backorder so that Order Orchestration can determine the fulfilling location.
- If the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to ALWAYS, the system bypasses reservation for all eligible items on a ship-for-pickup order and places them on backorder so that Order Orchestration can determine the fulfilling location.

- batch process: A periodic function finds eligible backordered lines and assigns them to Order Orchestration.

Eligibility rules: Order Administration determines whether an order line is eligible for Order Orchestration fulfillment based on certain basic criteria, such as whether it is fully backordered and authorized; also, you can use related system control values to further restrict Order Orchestration assignment based on your business rules, such as omitting items you are due to receive soon on open purchase orders. Also, the item must be flagged as [OROB eligible](#). See [Rules for Submitting Backorders to Order Orchestration](#) for details.

If the authorization for the order line has expired, the system obtains a new authorization.

Does each line create a separate order in Order Orchestration? Each eligible backordered line on an order is sent to Order Orchestration:

- as a separate order if the [Use Split Order \(L56\)](#) system control value is unselected. In this case, the fulfillment of each line is tracked individually. Order Orchestration does not attempt to assign multiple order lines from the same fulfilling location.
- as part of a single order if the [Use Split Order \(L56\)](#) system control value is selected. In this case, Order Orchestration attempts to assign all lines on the same order to the same fulfilling location; however, it notifies Order Administration about multiple assigned fulfilling locations if the order or lines are split. If a single backordered item is unfulfillable through Order Orchestration, that line returns to standard backorder processing, but additional lines on the order can still be fulfilled through Order Orchestration.

What information is sent to Order Orchestration? Order Administration sends the following information to Order Orchestration:

- sold-to and ship-to customers' names and addresses.
- details on the requested item.

It does not send payment information, although only fully paid and authorized items are eligible for Order Orchestration fulfillment. If the [Payment at POS for Ship for Pickup Orders \(L60\)](#) system control value is selected, ship-for-pickup orders are authorized for verification only and payment is collected when the customer picks up the items at the store.

If the authorization for an order line has expired, the system obtains a new authorization.

For more information on the information sent to Order Orchestration, see Sample Order Orchestration Messages in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

Brokered Backorder Fulfillment: Initial Order Creation

#	Step
1.	The process begins when you create an order in Order Administration. If the Send B/O to OROB (K08) system control value is selected, the system sends eligible backordered items to Order Orchestration to determine the fulfilling location. In addition: • If the Use OROB for Fulfillment Assignment (M31) system control value is selected, the system bypasses reservation and places all eligible items on backorder, even if the item is available in an Order Administration warehouse, in order to have Order Orchestration determine the fulfilling location. • If the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to ALWAYS, the system bypasses reservation and places all eligible items on a ship-for-pickup order on backorder, even if the item is available in an Order Administration warehouse, in order to have Order Orchestration determine the fulfilling location. The order creation can occur through interactive order entry, batch order entry, or the order API. You can also use the BROKER periodic function to submit existing backordered lines to the Order Orchestration for fulfillment; see Additional Order Orchestration Setup in Order Administration for more information.

#	Step
2.	If the order line meets the Rules for Submitting Backorders to Order Orchestration , the BROKER_ORD process in Order Administration generates a request message to Order Orchestration and creates an Order Orchestration record.

 Note:

Order lines that meet the [Rules for Submitting Backorders to Order Orchestration](#) do not sell out initially, even if the items are flagged with soldout control codes. See [Brokering Items with Soldout Control Codes](#) for more information.

If the order includes multiple backordered lines and the Use Split Order (L56) system control value is selected, the request message includes all eligible backordered lines; otherwise, each backordered item is submitted as a separate order. Each Order Orchestration record has a status of R (ready) at creation. Also, the order line is updated to restrict it from standard backorder processing in Order Administration:

- the *Drop ship* flag is set to D.
- the *Printed quantity* is updated to the ordered quantity.
- an order line that is assigned to Order Orchestration for fulfillment displays a status of OBR in standard order inquiry.
- the quantity to be brokered does not update the *Backordered quantity* for the Item Warehouse.
- if the Use OROB for Fulfillment Assignment (M31) system control value is selected, the *Bypass reservation* flag is selected with a *Backorder reason* of `Reservation bypassed` indicating the brokered backorder was created for fulfillment assignment.
- if the order is a ship-for-pickup order sent for fulfillment assignment, the *Bypass reservation* flag is selected with a *Backorder reason* of `Reservation bypassed` indicating the brokered backorder was created for fulfillment assignment.

3. If the BROKER_ORD process in [Working with Integration Layer Processes \(IJCT\)](#) is active, it immediately generates the submit order request message to Order Orchestration to request order creation and assignment in Order Orchestration. At this time, it also changes each Order Orchestration record's status to W (waiting) and creates an Order Orchestration History record for each line to track the order submission (A - Send Order Request).

See the Sample Order Orchestration Messages in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

 Note:

Although the BROKER_ORD process generates the submit order requests (and cancellation requests, if needed), the BROKER process handles other requests to Order Orchestration.

#	Step
4.	The Routing Engine module in Order Orchestration receives the submit order message. If Order Administration sent each line separately, Order Orchestration creates each order line as a separate order in its database; otherwise, if you use the split order option, Order Orchestration creates a single order including all of the order lines that were eligible for submission as brokered backorders. Order Orchestration assigns each order or line to a location for fulfillment based on inventory availability and the business rules you have defined in Order Orchestration. At this point, the order status in the Order Orchestration database is <code>new_order</code> .
5.	Order Orchestration sends a response message to Order Administration indicating each assigned fulfilling location and the unique request ID it uses to identify each order. See the Submit Order Response Message Sample in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

**Note:**

The message version is specified in the [Order Orchestration Properties](#); this property must be set to 16.0 or higher in order to use brokered backorders for fulfillment assignment and to use ship-for-pickup processing.

6. If Order Orchestration successfully created an order and assigned it to one or more fulfilling locations, Order Administration:
 - updates each Order Orchestration record with:
 - the fulfilling location, using the description set up through the [Work with Store Cross Reference \(WSCR\)](#) option.
 - the request ID.
 - a status of A (acknowledged).
 - writes an Order Transaction History message indicating that the order line was acknowledged by Order Orchestration (for example, Ln#: 2 Acknowledged by Broker).
 - creates an Order Orchestration History record (B - Receive Order Response).

Split line? If the *Allow Split Line?* preference in Order Orchestration is selected, Order Orchestration might split the quantity of a single brokered backorder line across more than one fulfilling location. For example, you create an order for item AB100 with a quantity of 10. There is no single location that has a quantity of 10 available. Order Orchestration assigns 8 units to location 100, and 2 units to location 200.

Order Orchestration splits order lines or line quantities only if you have selected the *Allow Split Order?* and *Allow Split Line?* preferences in Order Orchestration, and if there is not a single location that can fulfill the entire order or line quantity. See the Use Split Order (L56) system control value for examples, and see the Order Orchestration Operations Guide or online help for background.

If Order Administration is the fulfilling location: If the Use OROB for Fulfillment Assignment (M31) system control value is selected or the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to ALWAYS, Order Orchestration may determine that a warehouse in Order Administration is the best location to fulfill the order, or some portion of the order. In this situation:

- Order Orchestration assigns the Order Administration location to the order in Order Orchestration as the *Fulfilling location*.

- When the order in the fulfillments response message is received:
 - If the original order is not a ship-for-pickup order, it creates a new delivery order and assigns the order type defined in the [Order Type for Delivery Orders Originating in OROMS \(M33\)](#) system control value to the order.
 - If the original order is a ship-for-pickup order, it creates a new retail pickup order and assigns the order type defined in the [Order Type for Retail Pickup Orders Originating in OROMS \(M35\)](#) system control value to the order.
- In order to tie the originating order (the original order sent to Order Orchestration for fulfillment assignment) with the new fulfilling order (the delivery or retail pickup order created to fulfill the original order), Order Administration:
 - stores the originating order number in the *E-commerce order number* field in the Order Header Extended table for the newly created sourcing order. For example, the system updates the *E-commerce order number* with ORIG#: 9999-001, where ORIG#: indicates the order has been created as a result of OROB fulfillment assignment, 9999 is the order number, and 001 is the ship-to number.
 - assigns the *Request ID* defined for the originating order to the newly created sourcing order.

See [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#) for more information on how Order Administration processes a delivery or retail pickup order.

If the assigned fulfilling location rejects the order: The location assigned to fulfill an order or line can reject it if, for example, it does not have sufficient inventory. In this situation, Order Orchestration uses the rules set up at the **Preferences** screen in Order Orchestration to select another location to fulfill the order. If the location where the order is currently assigned changes, Order Administration updates this information the next time it sends a status inquiry to Order Orchestration, typically through pick slip generation, and receives the new information in the response.



Note:

An order normally remains in Rejected status in Order Orchestration only for a moment. If for any reason Order Orchestration receives a status inquiry request when the order's status is Rejected, Order Administration does not update the order until the next time it sends a periodic status inquiry.

What if Order Orchestration cannot find a location to fulfill the order or line? In some cases, Order Orchestration cannot assign an order to a location because there are no locations with sufficient inventory that are eligible based on the business rules set up in Order Orchestration at the **Preferences** screen. In this situation, Order Orchestration assigns the order to the *Default Unfulfillable Location* specified in Order Orchestration, which should match the setting of the [OROB Default Location Code for Unfulfillable Orders \(K56\)](#) system control value. When Order Administration receives a response message indicating that the order was assigned to the unfulfillable location and has a status of *Unfulfillable*, it:

- Clears the *Drop ship* flag and the *Printed quantity* on the Order Detail line.
- If the Use OROB for Fulfillment Assignment (M31) system control value is selected or the original order is a ship-for-pickup order, unselects the *Bypass reservation* flag and updates the *Backorder reason* to *Not enough avail in whse*.
- Changes the status of the Order Orchestration record to U (unfulfillable).

- Writes an Order Transaction History record (for example, Ln#: 2 Unfulfillable by Broker).
- Returns the line to standard backorder or soldout processing, including updating the *Backorder quantity* for the Item Warehouse and updating the PO Layering record.

An order might be flagged as unfulfillable when Order Orchestration first receives the request message, or after one or more locations have rejected the order for fulfillment; in this case, Order Administration receives notification the next time it sends a periodic status inquiry, as described below.

Notifying the customer of fulfillment assignment through Order Orchestration: The order confirmation email indicate a status of Store Ship for order lines assigned to Order Orchestration. See the [Order Confirmation Email Sample and Contents](#) for more information.

Fulfillment Process: After Order Creation and Status Updates

Status list inquiry request and response process: The BROKER IJCT job no longer calls the OOCS Status List request message for the latest status where the brokered status is still considered open. Instead, a web service is used to accept status updates from OOCS real-time. After each status update is complete in OOCS, a new Status Update message is sent immediately to OACS giving the current Quantity and Status of every line that was sent in the Status Update request.

If status has not changed: Once the order line is in Accepted status, Order Administration does not write a history record for the status list inquiry response as long as the record remains in this status.

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
Order Administration sends the submit order message to Order Orchestration and restricts the order line from standard processing in Order Administration by setting the <i>Drop ship</i> flag and the <i>Printed quantity</i> .	not yet created	Waiting (W)	• creates an Order Orchestration History record to track the order submission (A - Send Order Request)

Activity	Status in OOCs	Status in OACS	Updates to Order Orchestration and Order Transaction History
Order Administration receives the submit order response from Order Orchestration	new_order	Acknowledged (K)	If there is a single fulfilling location: - creates an Order Orchestration History record to track the response (B - Receive Order Response) - updates the Order Orchestration record with the assigned fulfilling location - writes an Order Transaction History message (for example, Ln#: 1 Acknowledged by Broker) Otherwise, if there are multiple fulfilling locations, Order Administration sends a status inquiry request to Order Orchestration and performs the above activities when it receives the response.
Polling: Each fulfilling location is responsible for polling Order Orchestration periodically to check for new orders. Once Order Orchestration receives a polling request from a location, it sends a polling response, listing the details of all new orders assigned to the location for fulfillment.	polled	Polled (P) (after receiving status inquiry response)	- creates an Order Orchestration History record (D - Receive Status Response) - writes an Order Transaction History message (for example, Ln#: 1 Polled by Broker)

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
Order accepted? If the assigned location can fulfill the order or line, it sends a status update message accepting the order or line to Order Orchestration.	accepted	Accepted (A) (after receiving status inquiry response)	- creates an Order Orchestration History record (D - Receive Status Response) - writes an Order Transaction History message (for example, Ln#: 1 Accepted by Broker)

 Note

Once the order line is in Accepted status, Order Admin is at ion d

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			o es n ot w ri te a hi st or y re co rd fo r th e st at us in q ui ry re sp o ns e as lo n g as th e re co rd re m ai ns in th is st at us .

Activity	Status in OOCs	Status in OACS	Updates to Order Orchestration and Order Transaction History
Order rejected? If the assigned fulfilling or sourcing location cannot fulfill the order or line, or the pickup location for a ship-for-pickup order indicates that the inventory for the item was not received or was damaged in transit, it sends a status update rejecting the order or line to Order Orchestration. Order Orchestration then:			
Attempts to find another location, subject to the rules you have set up in Order Orchestration. If it finds another location, Order Orchestration updates the record in its database and changes the order status back to <code>new_order</code>. Then the process begins again as Order Orchestration waits until the newly-assigned location polls for orders.	<code>new_order</code>	Acknowledged (K) (after receiving status inquiry response)	- creates an Order Orchestration History record (D - Receive Status Response) - writes an Order Transaction History message (for example, Ln#: 1 Acknowledged by Broker)
If Order Orchestration does not find another fulfilling location, it flags the order or line as unfulfillable by assigning it to the <i>Default Unfulfillable Location</i> you have set up in Order Orchestration (matching the OROB Default Location Code for Unfulfillable Orders (K56) in Order Administration). When Order Administration receives the status inquiry update indicating a fulfilling location that matches the OROB Default Location Code for Unfulfillable Orders (K56), it flags the order or line as unfulfillable and returns the line to standard backorder or soldout processing, clearing the <i>Drop ship</i> flag and the <i>Printed quantity</i> for the order line.	<code>new_order</code>	unfulfillable (U) (after receiving status inquiry response)	- creates an Order Orchestration History record (D - Receive Status Response) - writes an Order Transaction History message (for example, Ln#: 5 Unfulfillable by Broker)

Activity	Status in OOCs	Status in OACS	Updates to Order Orchestration and Order Transaction History
In Transit (ship-for-pickup, retail pickup): The location assigned to fulfill a ship-for-pickup order has sent the inventory to the location where the customer will pick up the order. Once the fulfilling location has shipped the order or line, it sends a status update message to Order Orchestration, providing the ship via and tracking number if available. Order Orchestration changes the status to In Transit and stores the ship via and tracking number so that it can send this information to Order Administration. The tracking number is not available as a live link on screens.	In Transit	intransit	- creates an Order Orchestration History record (D - Receive Status Response) - writes Order Transaction History messages indicating the ship via and the tracking number passed from Order Orchestration (for example, ----VIA: UPS and ----TRK#: ABCDEFG1234567890). If there is not tracking information available, writes an Order Transaction History message such as Ln#: 1 Store Shipped Order Create invoice? If the Invoice Ship For Pickup Order Once Intransit (M73) system control value is selected, Order Administration may create the invoice for the originating order when it receives a status inquiry response from Order Orchestration indicating that order lines on a ship-for-pickup order are now in transit. See that system control value for more information.

 **Note:**
O
A
C
S
n
o
l
o
n
g
e
r

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			tr ie s to co m bi n e O rd er O rc h es tr at io n fu lfi ll m e nt s in to a si n gl e in v oi ce b ut ra th er it is b as e d o n h o w

Activity	Status in OACS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			the fulfillment system sends the request to OCS. Therefore, for integrating systems, if you send it at

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			us u p d at es , y o u n ee d to co ns id er if y o u se n d th e m to ge th er or o n e at a ti m e.

Activity	Status in OOCs	Status in OACS	Updates to Order Orchestration and Order Transaction History
Intransit Polled (ship-for-pickup): The pickup location for a ship-for-pickup order: • has received the order in the intransit response message, if the system is not flagged to <i>Require Status Update</i>; or • has sent a status update request changing the status to intransit polled	In Transit Polled	intransit polled	• creates an Order Orchestration History record (D - Receive Status Response) • writes an Order Transaction History message (for example, Ln#: 1 Intransit Polled by Broker) Create invoice? If the Invoice Ship For Pickup Order Once Intransit (M73) system control value is selected, Order Administration may create the invoice for the originating order when it receives a status inquiry response from Order Orchestration indicating that order lines on a ship-for-pickup order are now in transit polled, if the invoice was not already created. See that system control value for more information.

 **Note:**
O
A
C
S
n
o
l
o
n
g
e
r
t
r
i
e
s
t
o
c
o
m
b
i
n
e

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			O rd er O rc h es tr at io n fu lfi ll m e nt s in to a si n gl e in v oi ce b ut ra th er it is b as e d o n h o w th e fu lfi lli n g sy st

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			e m se n ds th e re q u es t to O O C S. T h er ef or e, fo r in te gr at in g sy st e m s, if y o u se n d st at us u p d at es , y o

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			u n e e d to co ns id er if y o u se n d th e m to ge th er or o n e at a ti m e.

Activity	Status in OOCs	Status in OACS	Updates to Order Orchestration and Order Transaction History
Received (ship-for-pickup, retail pickup): The transferred inventory has been received at the location where the customer is picking up a ship-for-pickup order.	Received	received	- creates an Order Orchestration History record (D - Receive Status Response) - writes an Order Transaction History message (for example, Ln#: 1 Store Received) Create invoice? If the Invoice Ship For Pickup Order Once Intransit (M73) system control value is selected, Order Administration may create the invoice for the originating order when it receives a status inquiry response from Order Orchestration indicating that order lines on a ship-for-pickup order are now received, if the invoice was not already created. See that system control value for more information.

 **Note**
:
O
A
C
S
n
o
l
o
n
g
e
r
t
r
i
e
s
t
o
c
o
m
b
i
n
e

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			Order Orchestration fulfillment s into a single invoice but rather it is based on how the fulfillment system

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			e m se n ds th e re q u es t to O O C S. T h er ef or e, fo r in te gr at in g sy st e m s, if y o u se n d st at us u p d at es , y o

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			u n ee d to co ns id er if y o u se n d th e m to ge th er or o n e at a ti m e.

Activity	Status in OOCs	Status in OACS	Updates to Order Orchestration and Order Transaction History
Order shipped (delivery) or picked up (ship-for-pickup, retail pickup): Once the fulfilling location has shipped the order or line (delivery) or the customer has picked up the merchandise at the store location (ship-for-pickup), it sends a status update message to Order Orchestration. For delivery orders, the update message also provides the ship via and tracking number if available. Order Orchestration changes the status to fulfilled and stores the ship via and tracking number so that it can send this information to Order Administration. When Order Administration receives notification, it clears the <i>Drop ship</i> flag and the <i>Printed quantity</i>, and submits the order line to billing. If Order Orchestration provides a valid ship via code and a tracking number, the tracking number is a live link in the shipment confirmation email, although not on screens. See the <i>OrderShipmentLineDetail</i> in the outbound email message for details. For more information see the Web Services Guide on https://support.oracle.com My Oracle Support (ID 2953017.1).	fulfilled	completed (X) (after receiving status inquiry or inquiry list response)	• writes an Order Transaction History message (for example, Ln#: 2 Store Shipped Order) • writes Order Transaction History messages indicating the ship via and the tracking number passed, if any, from Order Orchestration (for example, ----VIA: UPS and ----TRK#: ABCDEFG1234567890) • Billing the order: When processing status update responses for the same order, if the status of an order line changes to fulfilled, the BROKER job: – Changes the status to fulfilled for each order line if that status is indicated in the response message; – Identifies the order lines that were previously in the same status, such as accepted, and are now in fulfilled status; – Submits these order lines to billing as a single billing header record. Example: • An order previously had two lines in accepted status and one line in acknowledged status. • The response message indicates that all three lines are now in fulfilled status. • The two order lines whose status changed from accepted to fulfilled are submitted to billing under a single billing header record, creating a single invoice. • The one order line whose status changed from

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			acknowledged to fulfilled are submitted to billing as a separate billing header record, creating a separate invoice.
			 Note : Generating a single invoice takes place regard less of whet her the fulfi ll e

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			d or d er li n es h a v e di ff er e nt O rd er O rc h es tr at io n re q u es t ID s, pr o vi d e d th e u p d at es ta k e pl ac e as

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			described above.
			 Note: The billing agency job does not complete billing through order entry.

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			nt il o n e of th e fo ll o w in g oc c u rs : • The BROKER job be- nds , or • An other er b r o k e r e d o

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			Order is submitted to the billing queue, or All the current st

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			a t t e n d i n g q u e r y r e s p o n s e s a r e p r o c e s s e d f o r t h e c o m p a n y . If a l a r g e n u m

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			ber of orders were submitted in the statistics list request, there could be a delay of several minutes before

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History

e
th
e
or
d
er
is
bi
ll
e
d.

 **N
o
te**

:

If
th
er
e
ar
e
m
ul
ti
pl
e
or
d
er
li
n
es
co
nf
ir
m
e
d
as
fu
lfi
ll
e
d
o
n
a
si

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History
			n gl e or d er , b ut fo r di ff er e nt sh ip - to s, th is ge n er at es se p ar at e bi lli n g h ea d er re co rd s a n d in v oi ce sh ip

Activity	Status in OOCS	Status in OACS	Updates to Order Orchestration and Order Transaction History

-
to
s.
M
ul
ti
pl
e
in
v
oi
ce
s
ar
e
cr
ea
te
d
fo
r
a
si
n
gl
e
or
d
er
if
n
ot
al
l
or
d
er
li
n
es
ar
e
in
cl
u
d
e
d
in
th
e
sa
m
e

Activity	Status in OOCs	Status in OACS	Updates to Order Orchestration and Order Transaction History
			st at us lis t re sp o ns e m es sa ge .

Order status changes? If the [Send Held Orders to OROB \(M18\)](#) system control value is selected, Order Administration sends held brokered backorders to Order Orchestration, but with the *Under Review* flag set to Y; also, Order Administration sends an order update to Order Orchestration if the order's status changes from held to open, or vice versa.

no change no change • when the change occurs after initial order creation and submission, writes an Order Transaction History message (for example, Request ID: 78390 Under Review: N)

Picked? If the assigned fulfilling location reports that a brokered backorder is in Picked status, the [Working with Order Broker \(WOBR\)](#) option indicates a status of Accepted.

Canceling a brokered backorder: See [Canceling a Brokered Backorder Request](#) for a discussion of the updates that take place when you cancel an Order Orchestration request at the [Work with Order Broker Screen](#) or in order maintenance.

Reviewing brokered backorders in order inquiry: You can use the [Brokered Backorder Summary Screen](#) to review the current status of all brokered backordered lines on a single order. Also, you can select D/S Status for a single brokered backorder line at the [Order Inquiry Detail Screen](#) to advance to the [Display Order Broker Details Screen](#), where you can review a single brokered backorder line on the order.

Quantity not indicated in order transaction history messages: The order transaction history messages do not specify the quantity affected by the update; however, if you split orders and lines, the quantity affected may be less than the total order line quantity. For example, if Order Orchestration splits an order line across two locations for fulfillment, and one of the locations fulfills its assigned quantity, the order transaction history message of Ln#: 2 Store Shipped Order does not indicate the fulfilled quantity.

Rules for Submitting Backorders to Order Orchestration

To be eligible for submission to Order Orchestration, the backordered item must have the [OROB eligible](#) flag selected. Also, the order line must be:

- fully backordered

- in open status

In addition, if the Use OROB for Fulfillment Assignment (M31) system control value is selected or the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to ALWAYS and the original order is a ship-for-pickup order, the order or order line can include the following; otherwise, the order or order line cannot include the following.

- be gift wrapped
- have any special handling

 Note:

only custom special handling instructions are sent to Order Orchestration in the submit order request; however, the system does not prevent items with standard special handling from being sent to Order Orchestration

- have a future arrival date or be flagged as a future order
- be for a customer flagged to bypass reservation

If the Use OROB for Fulfillment Assignment (M31) system control value is set to ALWAYS, the originating location passed to Order Orchestration on a delivery order is the location defined in the [Originating Location to Pass to OROB \(M32\)](#) system control value.

Also, if the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to ALWAYS, the order line can be on a ship-for-pickup order; otherwise, if this system control value is set to NEVER or blank, order lines on a ship-for-pickup order are not eligible for submission to Order Orchestration to determine fulfillment assignment and instead are sent to Order Orchestration during pick slip generation and drop ship order processing time; see [Ship-for-Pickup Orders](#).

Regardless of the settings of the Use OROB for Fulfillment Assignment (M31) and Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control values, the order line must not be:

- Flagged as a drop ship item
- A retail pickup or delivery order received from Order Orchestration
- A main set item or a set component
- A membership item
- A stored value card item
- A non-inventory item

Order Administration does not consider the item's *Projected returns* quantity, if any, when determining whether the item is eligible for fulfillment through Order Orchestration.

Also, the order must be:

- Open, if the Send Held Orders to OROB (M18) system control value is unselected; otherwise, the order can be held. In this case, the order's *Under Review* flag is selected. See the system control value for more information.
- Fully paid and authorized. If the [Payment at POS for Ship for Pickup Orders \(L60\)](#) system control value is selected, ship-for-pickup orders are authorized for verification only and payment is collected when the customer picks up the items at the store.

System control values: If the Use OROB for Fulfillment Assignment (M31) system control value is selected or if the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system

control value is set to ALWAYS and the original order is a ship-for-pickup order, regardless of the setting of the following system control values, the system sends items to Order Orchestration for fulfillment assignment. Otherwise, the following system control values also determine whether an order line is eligible to send to Order Orchestration for fulfillment:

- **Order Broker Due Date Threshold (K11):** the system does not send an item to Order Orchestration if the item is expected on an open purchase order line for the related warehouse with a due date within the threshold defined in this system control value.
- **Order Broker Include Ship Complete Orders (K12):** if this system control value is unselected, the system does not send items to Order Orchestration that are on an order flagged to ship complete.
- **Order Broker Include Coordinate Grouped Orders (K13):** if this system control value is unselected, the system does not send items to Order Orchestration that are coordinate grouped with other items.
- **Order Broker Include Gift Orders (K14):** if this system control value is unselected, the system does not send items to Order Orchestration that are on a gift order.

Sellout prevented: If an order line meets all of the criteria, it is brokered even if the item is flagged with a soldout control code. See [Brokering Items with Soldout Control Codes](#) for a discussion.

BROKER Periodic Function

The BROKER periodic function submits orders to Order Orchestration if they were not eligible for submission when they were created. For example, the periodic function submits order lines if:

- Your company was not configured to send brokered backorders to Order Orchestration when the order was created.
- The order was in held status at initial creation and was subsequently released from hold, and the Send Held Orders to OROB (M18) system control value is unselected.
- The order previously included an active PO item (see [About Active PO Items](#) for background).
- The order line was partially reserved, but then the reserved quantity was shipped and there is still a backordered quantity remaining on the order line. The order line is not eligible to be submitted to Order Orchestration until any reserved quantity is printed and shipped.

Note:

This situation occurs only if the Use OROB for Fulfillment Assignment (M31) system control value is unselected; also, this situation does not apply to ship-for-pickup orders sent to Order Orchestration for fulfillment assignment.

Note:

When the periodic function submits an order line as a brokered backorder, the function performs all the updates described under [Brokered Backorder Fulfillment: Initial Order Creation](#), but also decreases the *Backorder quantity* for the Item Warehouse record, since this quantity had been increased when the line was created.

If an authorization is required, the BROKER function obtains an authorization for the entire order.

See [Additional Order Orchestration Setup in Order Administration](#) for background on setting up the BROKER periodic function.

Brokering Items with Soldout Control Codes

Items that are *OROB eligible* and flagged with a *S/O control* code are still eligible for brokering rather than selling out, provided they meet the [Rules for Submitting Backorders to Order Orchestration](#).

In addition, the following applies if the Use OROB for Fulfillment Assignment (M31) system control value is unselected and the order is not a ship-for-pickup order.

If the soldout control status is:

- sell out immediately: the item is eligible for brokering even if there is an available quantity in an allocatable warehouse.
- include on-order: the item is eligible for brokering if it is backordered. There cannot be an open purchase order that could fulfill the order that is due within Order Orchestration Due Date Threshold (K11), if specified. If no Order Broker Due Date Threshold (K11) is specified, the item is eligible for brokering regardless of open purchase orders. The *Projected returns* quantity, if any, for the item is not evaluated; see Projected Returns for background on how you can use the *Projected returns* quantity to prevent selling out items in certain situations.
- exclude on-order: the item is eligible for brokering if it is backordered, regardless of whether there are any open purchase orders.

If the item is unfulfillable: If Order Orchestration is unable to fulfill an order line, the line returns to standard backorder or soldout processing. The process flow is:

- An item is assigned a soldout control value and would be sold out on the order if the item were not *OROB eligible*. Order Administration submits the order line to Order Orchestration, but there is no store location that can fulfill the item, so Order Orchestration returns a status of Unfulfillable.
- When Order Administration receives the status update from Order Orchestration, it changes the order line status to sold out (S) if the order line is currently eligible to sell out based on the soldout control value and availability.
- The next time you use the [Processing Auto Soldout Cancellations \(MASO\)](#) option, the soldout line is listed on the [Auto Soldout Register](#), even though it did not sell out through Process Auto Soldouts and even if it is not assigned a soldout control status of 1 (sell out immediately).
- The next time you use the Generating Soldout Notifications (MSON) option, Order Administration generates a soldout notification.

The same processing occurs if Order Orchestration returns an error for the brokered order line.

Gift wrap or special handling: Based on the [Rules for Submitting Backorders to Order Orchestration](#), if the Use OROB for Fulfillment Assignment (M31) system control value is unselected or the order is not a ship-for-pickup order, an order line is not eligible for brokering if it is flagged for gift wrap or special handling. If gift wrap or special handling applies to the item:

- When the order line is initially created, then the line does not broker; instead, it sells out or remains backordered, as if it were not flagged as *OROB eligible*. This is the case when the order API or ecommerce interface creates the order.

- After the order line is initially created (for example, by selecting Special Handling for the line in order entry), then if the soldout control status is:
 - sell out immediately: the line sells out the next time you use Processing Auto Soldout Cancellations (MASO).
 - include on-order quantity or exclude on-order quantity: the line does not sell out automatically.

You can use a backorder report to identify order lines that could not be brokered because of gift wrap or special handling, and that did not sell out automatically. See [Order Status and Activity Reports](#) for more information.

Future orders: If the Use OROB for Fulfillment Assignment (M31) system control value is unselected or the order is not a ship-for-pickup order, future orders are not eligible to be brokered; in this situation, items flagged *OROB eligible* and assigned soldout control values sell out automatically on future orders, just as they would if they were not flagged *OROB eligible*. Once an order is no longer considered a future order, *OROB eligible* items on the order can be brokered through the BROKER periodic function if they meet the [Rules for Submitting Backorders to Order Orchestration](#).

If reserving against a non-allocatable warehouse: Based on the [Reserve from Non-Allocatable Warehouse \(J25\)](#) and [Disregard Soldout Controls for Non-Allocatable Warehouses \(J27\)](#) system control values, you can reserve inventory against a non-allocatable (retail) warehouse for a retail order, and disregard an item's soldout control assignment. In this case, even if the item's *OROB eligible* field is selected, the item reserves against the non-allocatable (retail) warehouse if the order type is associated with that warehouse and there is inventory in that warehouse.

Things to Note About Brokered Backorders

Canceling order lines: It is important to confirm that the remote store location assigned to fulfill the order line has not begun the shipment process before you cancel an order line or Order Orchestration request in Order Administration. Depending on the Order Broker Status Update Interval (K10), the most current information about the Order Orchestration request in Order Administration might be out of date.

Freight charges included? Freight charges for the order are included in the SubmitOrder message only if the Use Split Order (L56) system control value is selected.

Customer address updates: If you change the customer's name or address in Order Administration after generating the initial Order Orchestration request, the Order Orchestration integration does not send this updated information to the assigned fulfilling location. For ship-for-pickup orders, the system does not allow you to change the store location defined as the one-time ship-to address on the order once the order is accepted.

Held orders submitted? When the Send Held Orders to OROB (M18) system control value is unselected, if an order is initially created in held status and then released from hold, Order Administration does not automatically submit the order to Order Orchestration. To submit the order, you can run the [BROKER Periodic Function](#) (program PFR0083). See [Order Orchestration Configuration](#) for background.

Order lines not resubmitted: If an order line has previously been submitted to Order Orchestration and the Order Orchestration request was flagged as unfulfillable or put in error status, the BROKER periodic function does not resubmit the order line to Order Orchestration for fulfillment.

Reserve quantity limit: If an order line exceeds the [Reserve qty \(Reserve quantity limit\)](#) specified for an item, Order Administration still submits the order line to Order Orchestration for fulfillment, provided the line is eligible based on the [Rules for Submitting Backorders to Order Orchestration](#).

Inventory transaction history: If the [Create Item Transaction History for Non-Inventory Items \(E39\)](#) system control value is selected, Order Administration writes a NONINVISSU transaction record when the BROKER process receives a status update indicating that the assigned location has shipped the order or line. See that system control value for more information.

Backorder notices: The [Generate Backorder Notices \(GBOC\)](#) option does not generate backorder notices for an order line when it has an Order Orchestration request in process; however, if the status of the Order Orchestration request changes to unfulfillable (U) or error (E), or if you cancel the Order Orchestration request (Z) without canceling the order line itself, the order line returns to standard backorder processing and is eligible to have backorder notices generated.

Tracking numbers in shipment confirmation email: If the fulfilling location supplies information on the shipping agent and a tracking number, Order Orchestration passes this information to Order Administration. If the shipping agent matches a valid ship via code in Order Administration, the shipment confirmation email lists the description of the ship via and the tracking number as a live link. Otherwise, if the shipping agent does not match a ship via set up in Order Administration, then the shipment confirmation lists the shipping agent as it was passed from Order Orchestration, and the tracking number is plain text.

 Note:

If a brokered backorder ships on the same day as a warehouse shipment, the shipment confirmation email includes just the tracking number for the brokered backorder. This occurs regardless of whether you consolidate invoices.

See the [Shipment Confirmation Email Sample and Contents](#) for more information, and see the *OrderShipmentLineDetail* for detailed mapping.

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

 Important:

In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date.

Tracking numbers in customer history API: If Order Orchestration passes the shipping agent and a tracking number, the *Detailed Order Inquiry Response XML Message (CWORDEROUT)* includes this information provided Order Administration can link the line number, shipping agent, and tracking number from the Order Transaction History messages to the invoice based on date.

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

Example:

The fulfilling location supplies information on the shipping agent and the tracking number to Order Orchestration, and Order Orchestration passes this information to Order Administration.

Order Administration writes Order Transaction History records such as:

SHIPMENT Ln#: 5 Store Shipped Order

SHIPMENT ----VIA: ABC

SHIPMENT ----TRK#: ABI123

The Order Transaction History records have the same date as the invoice.

The CWORDEROUT message passed through the customer history API includes the tracking information, for example:

```
<Shipment invoice_nbr="123456" invoice_ship_quantity="1"
invoice_ship_date="11292011" invoice_tracking_nbr="ABI123"
invoice_ship_via_desc="ABC"/>
```

 Note:

- If Order Administration writes the Order Transaction History for the shipment of a brokered backorder on a date that differs from the invoice date, then no tracking information is included in the customer history response. This situation might occur if, for example, Order Administration receives the status update of the shipment before midnight, but the billing async job does not create the invoice until after the job is automatically stopped and restarted, so that the next date is assigned to the invoice.
- The tracking information from Order Orchestration is not available as a live link on screens.

Other Order Orchestration orders not eligible: Order Administration does not submit a backordered delivery or retail pickup order to Order Orchestration for fulfillment. In addition, if the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to NEVER or blank, Order Administration does not submit a backordered ship-for-pickup order to Order Orchestration for fulfillment.

Line_locate_eligible flag in the CWORDEROUT message: If the Send B/O to OROB (K08) system control value is selected, the *Detailed Order XML Response* (CWORDEROUT) message used in the generic order API includes a flag for each order line to indicate whether the order line meets the [Rules for Submitting Backorders to Order Orchestration](#). Even if this flag is set to Y, it is possible that the line cannot be fulfilled as a brokered backorder if, for example, Order Orchestration does not find a location that has the item available.

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

The *Generic Customer History API* also uses the CWORDEROUT message. The message includes the `line_locate_eligible` flag if the order line is still open. In the case of the generic customer history API, the `line_locate_eligible` flag might be set to Y even if, for example, the line was already submitted to Order Orchestration, and then returned to normal backorder processing because Order Orchestration did not find a location to fulfill it.

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

Order Orchestration requires postal code: If the shipping address on a brokered backorder does not include a postal code, the Order Orchestration Order Orchestration rejects it. The *Require postal code?* flag for the country determines whether a postal code is required. See [Setting Up the Country Table \(WCTY\)](#) for background.

Reviewing brokered backorders in order inquiry: You can use the [Brokered Backorder Summary Screen](#) to review the current status of all brokered backordered lines on a single order. Also, you can select D/S Status for a single brokered backorder line at the [Order Inquiry Detail Screen](#) to advance to the [Display Order Broker Details Screen](#), where you can review a single brokered backorder line on the order.

The OBR status remains on each order line that is fully or partially fulfilled through Order Orchestration as a brokered backorder. This status is displayed on the [Order Inquiry Detail Screen](#).

The original backorder reason remains on the order line after fulfillment through Order Orchestration as a brokered backorder. This reason is displayed on the [Display Order Detail Screen \(Reviewing Order Line Detail\)](#). Typically, the backorder warehouse also remains on the order line as well, and is displayed on the [Display Order Detail Screen \(Reviewing Order Line Detail\)](#); however, if a shipment from the warehouse follows the fulfillment through Order Orchestration, the backorder warehouse field is cleared.

Order Orchestration Originating Location, Fulfilling Location, and Pickup Location

The screens in the [Working with Order Broker \(WOBR\)](#) menu option display the following types of locations: originating, fulfilling, and pickup.

- The *Originating location* is the location (store or warehouse) where the order originated. This location displays as the *Placed* location in Order Orchestration.
- The *Fulfilling location* is the location supplying the inventory for the order. This location displays as the *Sourced* location in Order Orchestration.
- The *Pickup location* is the location where the customer picks up the order; this location does not display for orders that are shipped to the customer. This location displays as the *Pickup* location in Order Orchestration.

The following table explains how the system determines the originating, fulfilling, and pickup locations for each broker delivery type.

Broker delivery type	Originating location	Fulfilling location	Pickup location
blank (brokered backorder for delivery or ship-for-pickup)	an Order Administration warehouse this is the <i>location_cd</i> in the <i>store_location</i> element of the submit order request message: - if the <i>transaction_type_id</i> is <code>DELIVERY</code> and the Use OROB for Fulfillment Assignment (M31) is unselected, from the OROB Default Location (K51) - if the <i>transaction_type_id</i> is <code>DELIVERY</code> and the Use OROB for Fulfillment Assignment (M31) is selected or the <i>transaction_type_id</i> is <code>SHIPFORPICKUP</code>, from the Originating Location to Pass to OROB (M32)	the store location or Order Administration warehouse assigned to ship the item to the customer this is the <i>fulfillment_location_cd</i> in the <i>fulfillment_detail</i> element of the submit order response message; when a status request response message is received, the location may update based on the <i>fulfilling_location_cd</i> in the <i>items</i> element	delivery: N/A; the order is shipped to the customer ship-for-pickup: this is the <i>location_cd</i> in the <i>shipforpickup_location</i> element of the submit order request message; from the store code in the one-time ship-to address
delivery	a store location or Order Administration warehouse this is the <i>request_location_cd</i> in the <i>store_location</i> element of the fulfillments response message	an Order Administration warehouse this is the <i>location_cd</i> in the <i>store_location</i> element of the fulfillments response message	N/A; the order is shipped to the customer
store pickup	an Order Administration warehouse this is the <i>location_cd</i> in the <i>store_location</i> element of the submit order request message; from the OROB Default Location (K51)	the store location the customer has selected to pick up the order; the inventory is available at this location and does not need to be transferred there this is the <i>fulfillment_location_cd</i> in the <i>fulfillment_detail</i> element of the submit order response message	the store location where the customer has selected to pick up the order this is the <i>location_cd</i> in the first <i>transaction_detail</i> element of the submit order request message; from the location, selected at the Store Pickup Search Results Screen, where the customer wants to pick up the order

Broker delivery type	Originating location	Fulfilling location	Pickup location
retail pickup (traditional retail pickup and retail pickup created as a result of a brokered ship-for-pickup)	the store location where the customer would like to pick up the merchandise this is the <i>request_location_cd</i> in the <i>store_location</i> element of the fulfillments response message	an Order Administration warehouse this is the <i>location_cd</i> in the <i>store_location</i> element of the fulfillments response message	the store location where the customer has selected to pick up the order this is the <i>location_cd</i> in the <i>shipforpickup_location</i> element of the fulfillments response message
ship-for-pickup (pick gen/drop ship)	an Order Administration warehouse this is the <i>location_cd</i> in the <i>store_location</i> element of the submit order request message: from the OROB Default Location (K51) if the Send Inventory by Warehouse to OROB (L06) system control value is unselected or for a drop ship item; otherwise, from the OROB location from the warehouse associated with the order	an Order Administration warehouse this is the <i>location_cd</i> in the <i>transaction_detail</i> element of the submit order request message: from the OROB Default Location (K51) if the Send Inventory by Warehouse to OROB (L06) system control value is unselected or for a drop ship item; otherwise, from the OROB location from the warehouse associated with the order	the store location where the customer has selected to pick up the order this is the <i>location_cd</i> in the <i>shipforpickup_location</i> element of the submit order request message: from the store code in the one-time ship-to address

Location description: Even if the location is a warehouse within your company in Order Administration, the description of the location is from the cross-reference record set up through [Work with Store Cross Reference \(WSCR\)](#), and is separated from the code by a hyphen. For example, a request assigned to warehouse 10, East Coast DC, lists a location of 10 - East Coast. Although the location code field in the Order Administration database is 25 positions, you cannot create a code that exceeds 10 positions in Order Orchestration.

 Note:

- The location description is stored in the Order Orchestration table. Entering or updating a location cross reference through Work with Store Cross Reference (WSCR) does not update the originating location displayed here.
- The location description displayed here is blank if you had not set up the cross reference at the time the response was received from Order Orchestration.
- Even if the location is an Order Administration warehouse, the warehouse description is not displayed here; you need to set up the cross-reference through Work with Store Cross Reference (WSCR).

When is the fulfilling location blank? The fulfilling location is blank for:

- *store pickup orders*: if you canceled the order in Order Administration. If another location sent a cancel request to Order Orchestration, which relayed it to Order Administration through a status inquiry request, the Order Orchestration record retains the

fulfilling location; however, if a single line on a store pickup order is rejected, the entire order (including any additional lines) is canceled, and in this situation the fulfilling location is blank for all items except the rejected item.

- *brokered backorders* whose status is:
 - **Z: Canceled**
 - **C: Closed**
 - **J: Rejected**
 - **R: Ready**
 - **W: Waiting**

The field might also be blank for requests in E: Error status, depending on the nature of the error. For example, requests that Order Orchestration did not receive and create successfully are not assigned to fulfilling locations.

Unfulfillable status: If Order Orchestration was unable to find a location to fulfill a brokered backorder, the fulfilling location matches the OROB Default Location Code for Unfulfillable Orders (K56) system control value. In this situation, the current status is Unfulfillable.

Order Orchestration Status Summary Table

The following table summarizes the status codes displayed at the screens in the [Working with Order Broker \(WOBR\)](#) menu option.

OACS status	OOCs status	Order types	Description
A (Accepted)	<i>Accepted or Picked</i>	brokered backorder (delivery or ship-for-pickup) or store pickup	The location assigned to fulfill the order has accepted it, or has accepted the order and is preparing it for shipment or pickup.
C (Closed)	N/A	brokered backorder (delivery or ship-for-pickup)	You canceled the request when its status was R (Ready), before it was submitted to Order Orchestration.
E (Error)	N/A	Any order type	Order Orchestration has returned an error response. See Troubleshooting the Order Orchestration Integration for information on some possible errors. A record might also be in Error status if another system submitted a status update request to Order Orchestration to cancel the order line.
F (Picking)	<i>New_Order or Picked</i>	retail pickup, delivery, or ship-for-pickup (pick gen/drop ship)	The pick slip has been printed.
G (Resend Fulfilled)	N/A	delivery	The Order Status Update request message to change the status in Order Orchestration to fulfilled did not generate a response message from Order Orchestration, possibly because message authentication failed or communication is down. In this case, the BROKER_ORD job re-sends the Order Status Update request the next time it runs.

OACS status	OACS status	Order types	Description
H (Resend Intransit)	N/A	ship-for-pickup	The Order Status Update request message to change the status in Order Orchestration to intransit did not generate a response message from Order Orchestration, possibly because message authentication failed or communication is down. In this case, the BROKER_ORD job re-sends the Order Status Update request the next time it runs.
I (In Process)	<i>Accepted</i>	retail pickup or delivery	The order was received from Order Orchestration and created without error.
J (Rejected)	unknown (order reassigned to new fulfilling location)	retail pickup or delivery	The order was sold out after creation in Order Administration.
K (Acknowledged)	<i>New_Order</i>	brokered backorder (delivery or ship-for-pickup) or store pickup	Order Orchestration has received the order request, assigned a request ID, selected a fulfilling location (brokered backorder), and created the order in its database.
L (Partial Fulfill)	<i>Partially Fulfilled</i>	retail pickup, ship-for-pickup, or store pickup	The customer has picked up one or more items on the order, but not the complete order.
N (New)	<i>Polled</i>	retail pickup or delivery	The order was received from Order Orchestration but is in error.
O (Posted)	<i>Posted</i>	brokered backorder, store pickup, or ship-for-pickup	Order Orchestration has submitted the order or order line for enterprise fulfillment. See Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing) for background.
P (Polled)	<i>Polled</i>	Any order type	Brokered backorder (delivery or ship-for-pickup) or store pickup: The assigned fulfilling location has polled Order Orchestration for new orders and been notified of this order. Retail pickup or delivery order: Order Administration created the order in held status.
R (Ready)	N/A	brokered backorder (delivery or ship-for-pickup), store pickup	Brokered backorder: The request is ready to be sent to Order Orchestration, but the BROKER_ORD process has not yet generated the request message. Store pickup: Order Administration attempted to send the order to Order Orchestration, but Order Orchestration has not responded. In this case, Order Administration retains the order information in the Store Pickup tables until communication with Order Orchestration resumes.

OACS status	OOCs status	Order types	Description
S (Received by Store)	<i>Received</i>	brokered backorder (ship-for-pickup), retail pickup or ship-for-pickup	The order has been received by the store location but not yet picked up by the customer. NOTE: This status is not displayed for ship-for-pickup or retail pickup orders that are actually in this status in Order Orchestration after Order Administration has submitted a status update message to Order Orchestration indicating that the merchandise is in transit to the pickup location; instead, the displayed status is X (Completed).
T (In Transit)	<i>Intransit</i>	brokered backorder (ship-for-pickup), retail pickup or ship-for-pickup	Ship-for-pickup: The location fulfilling the order has shipped the merchandise to the store for pickup. NOTE his status is displayed for ship-for-pickup if Use OROB for Ship for Pickup Fulfillment Assignment (M34) is set to ALWAYS; however, it is not displayed for retail pickup orders, or for ship-for-pickup orders if Use OROB for Ship for Pickup Fulfillment Assignment is set to NEVER, if the orders are actually in this status in Order Orchestration after Order Administration has submitted a status update message to Order Orchestration indicating that the merchandise is in transit to the pickup location; instead, the displayed status is X (Completed).
U (Unfulfillable)	N/A (brokered backorder) or <i>Rejected</i> (store pickup)	brokered backorder (delivery or ship-for-pickup) or store pickup	Brokered backorder: Order Orchestration has not found a location able to fulfill the order based on the rules set up in Order Orchestration. When it receives a response indicating that Order Orchestration cannot fulfill the order, Order Administration returns the order line to standard backorder or soldout processing. Store pickup: the assigned store location has rejected the order.

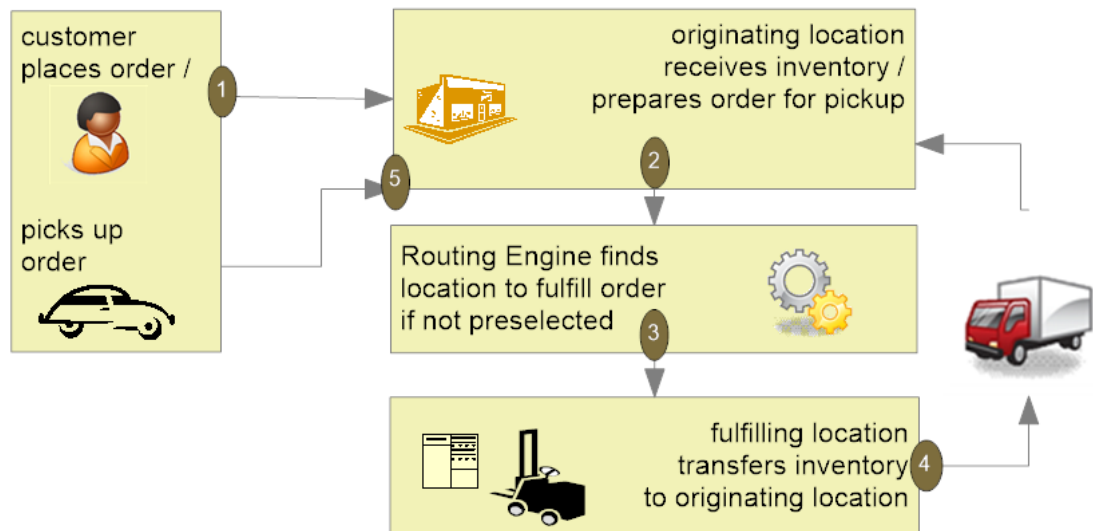
OACS status	OACS status	Order types	Description
V (In Transit Polled)	<i>Intransit Polled</i>	brokered backorder (ship-for-pickup), retail pickup or ship-for-pickup (pick gen/drop ship)	The pickup location for a ship-for-pickup order line: - has received the order line in the intransit response message, if the system is not flagged to Require Status Update; or - has sent a status update request changing the status to intransit polled. Only the pickup location for a ship-for-pickup order can update the status to intransit polled. This status applies only to ship-for-pickup orders. NOTE: This Status is not displayed for ship-for-pickup or retail pickup orders that are actually in this status in Order Orchestration after Order Administration has submitted a status update message to Order Orchestration indicating that the merchandise is in transit to the pickup location; instead, the displayed status is X (Completed).
W (Waiting)	unknown	brokered backorder (delivery or ship-for-pickup)	The order request message has been sent to Order Orchestration, but Order Administration has not yet received a response.
X (Completed)	<i>Fulfilled</i>	all order types	- Brokered backorder (delivery or ship-for-pickup): The fulfilling location assigned by Order Orchestration has shipped the item to the customer or the customer has picked up the entire order from the store. When Order Administration receives a status update indicating that the order line has been shipped, it bills the order line and saves the ship via and tracking number, if indicated in the response message, to the Order Transaction History table. - Delivery: You have confirmed shipment of the order to the customer. - Retail pickup, ship-for-pickup (pick gen), or store pickup: The customer has picked up the entire order. NOTE: This status is also displayed for retail pickup orders, and ship-for-pickup orders if Use OROB for Ship for Pickup Fulfillment Assignment (M34) is set to NEVER, after Order Administration has submitted a status update message to Order Orchestration indicating that the merchandise is in transit to the pickup location, even if the customer has not yet picked up the order.

OACS status	OACS status	Order types	Description
Y (Pending Cancel)	unknown	brokered backorder (delivery or ship-for-pickup), store pickup, retail pickup, delivery, or special ship-for-pickup	Brokered backorder: You have canceled the order line (including the Order Orchestration request), or you have canceled just the Order Orchestration request at the Work with the Order Orchestration Screen, but you have not yet received a confirmation of the cancellation from Order Orchestration. Store pickup: You have canceled the order, but you have not yet received a confirmation of the cancellation from Order Orchestration. Retail pickup, delivery, or special ship-for-pickup: You have voided the pick slip through the generic pick in API and the Cancel Reason (Pick In) (L86) system control value specifies a cancel reason, or a backorder cancellation reason code is specified in the <i>CWPickIn XML Message</i>, but you have not yet received a confirmation of the cancellation from Order Orchestration. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Z (Canceled)	<i>Canceled</i>	brokered backorder (delivery or ship-for-pickup), store pickup, special ship-for-pickup, or retail pickup	You have requested that the Order Orchestration order be canceled, and Order Orchestration has confirmed the cancellation. If the order line itself is not canceled, it returns to regular backorder processing. Note: If a status inquiry list response from Order Orchestration indicates that a brokered backorder line is canceled, the original Order Administration order line is put in error status; as a result, the canceled order line is either reserved, backordered, or sold out in Order Administration. If there is a fulfilling (bounceback) order that was created in Order Administration, it is put in Held status, with an order transaction history note of Order held - line[s] canceled in Order B.

Retail Pickup (including Ship-for-Pickup) or Delivery Orders

Overview: Use the retail pickup or delivery options in the [Order Orchestration Integration](#) to receive orders from Order Orchestration in order to fulfill the orders in Order Administration.

- If the order is a retail pickup order or a retail pickup order that originated as a ship-for-pickup order, Order Administration ships the merchandise to the customer-selected store location for pickup.
- If the order is a delivery order, Order Administration ships the merchandise to the customer's ship-to address.



If the originating location was Order Administration: If the [Use OROB for Fulfillment Assignment \(M31\)](#) system control value is selected or the [Use OROB for Ship for Pickup Fulfillment Assignment \(M34\)](#) system control value is set to ALWAYS, the order may have originated in Order Administration and during [Brokered Backorders](#) processing, Order Orchestration determined that Order Administration was the best fulfilling location. In this situation:

- Order Orchestration assigns the Order Administration location to the originating order in Order Orchestration as the *Fulfilling location*. See [Brokered Backorders](#) for additional processing information.
- At defined intervals, the BROKER process in Work with Integration Layer Processes (IJCT) periodically sends a fulfillments request message to Order Orchestration to poll for newly assigned orders (those whose *Fulfilling location* is an Order Administration location). See [Retail Pickup \(including Ship-for-Pickup\) and Delivery Order Processing](#) for additional processing information.
- When the BROKER process receives the order in the fulfillments response message, it looks at the values in the fulfillments response to determine the type of order to create.
 - The system creates a new delivery order if the *transaction_type_id* is DELIVERY.
 - The system creates a new retail pickup order if the *transaction_type_id* is RETAILPICKUP or SHIPFORPICKUP.

See [Building the Retail Pickup \(including Ship-for-Pickup\) or Delivery Order](#) for additional information.

- In order to tie the originating order (the original order sent to Order Orchestration for fulfillment assignment) with the new sourcing order (the delivery or retail pickup order created to fulfill the original order), Order Administration stores the originating order number in the *E-commerce order number* field in the Order Header Extended table for the newly created sourcing order and prefixes the order number with the text ORIG#:. For example, the system updates the *E-commerce order number* with ORIG#: 9999-001, where ORIG#: indicates the order has been created as a result of Order Orchestration fulfillment assignment, 9999 is the order number, and 001 is the ship-to number. See [Reviewing Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders in Order Inquiry](#) for additional information.

In this topic:

- [Retail Pickup \(including Ship-for-Pickup\) and Delivery Order Processing](#)
- [Building the Retail Pickup \(including Ship-for-Pickup\) or Delivery Order](#)
- [Retail Pickup \(including Ship-for-Pickup\) or Delivery Processing after Order Creation](#)
- [Reviewing Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders in Order Inquiry](#)
- [Things to Note about Retail Pickup \(including Ship-for-Pickup\) and Delivery Orders](#)

For more information: See [Reauthorization and Under Review Hold Scenarios for Orders Fulfilled through Order Orchestration](#).

Retail Pickup (including Ship-for-Pickup) and Delivery Order Processing

Poll for orders? If both the [Order Type for Orders Brokered for Delivery \(K91\)](#) and [Order Type for Retail Pickup Orders Brokered to OROMS \(K92\)](#) system control values specify order types, the BROKER process in [Working with Integration Layer Processes \(IJCT\)](#) periodically sends a fulfillments request message to Order Orchestration to poll for newly assigned orders. The polling interval is based on the *Outbound delay time* specified for the BROKER process.

fulfillments request: Information in the fulfillments request message includes:

- requesting location: From the [OROB Default Location \(K51\)](#) if the [Send Inventory by Warehouse to OROB \(L06\)](#) system control value is unselected; otherwise, from the OROB location from each warehouse that has this field populated. The requesting location must match an existing location set up in Order Orchestration.
- message source and requesting system: From the [OROB System \(K50\)](#).
- destination: From the [OROB Account \(K49\)](#).

See the Fulfillments Request Message Sample (Retail Pickup, Ship-for-Pickup, or Delivery Orders) in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for an example.

The endpoint where Order Administration sends the fulfillments request message is specified in [Working with Customer Properties \(PROP\)](#).

Create order? When the BROKER process receives an order in the fulfillments response message, it:

- Checks the setting of the [Retain Backordered Lines Brokered to OROMS \(K89\)](#) system control value. If this value is unselected and there is not a purchase order that might be able to fulfill the order expected within the [Order Broker Due Date Threshold \(K11\)](#), the process rejects the order. The process uses the [Send Inventory by Warehouse to OROB \(L06\)](#) system control value to determine whether to check a specific warehouse, or to check across all warehouses.
- Regardless of the setting of the [Retain Backordered Lines Brokered to OROMS \(K89\)](#) system control value, if the only item on the order is sold out, the process rejects the order.

**Note:**

- Drop ship items are eligible to be fulfilled on a retail pickup or delivery order regardless of whether any units are currently stocked in the warehouse, provided they are not flagged with a soldout control value.
- If a retail pickup or delivery order includes multiple order lines, and one of them is sold out, Order Administration still accepts the order. To avoid this situation, have integrating systems submit each order line as a separate order.

Multiple order lines? Submit each ordered unit to Order Orchestration as a separate order. Sending orders this way prevents any inconsistencies in order status that might occur if, for example, a multi-line order in Order Administration included a soldout item, but the other order lines could still be shipped from the warehouse, or if a multi-unit line was split across different warehouses for fulfillment.

Building the Retail Pickup (including Ship-for-Pickup) or Delivery Order

The processing to build a new retail pickup or delivery order from the contents of the fulfillments response message is similar to that used by the generic order API. In addition to the system (company) and location (warehouse) sent in the fulfillments request message, the information used to build the order includes the following.

- [Header Information](#)
- [Customer Mapping and Updates](#)
- [Ship-to Information](#)
- [Detail Information](#)
- [Payment Information](#)
- [Order Messages](#)
- [Additional Information on Mapping](#)

Header Information

- order type: from one of the following system control values:
 - [Order Type for Orders Brokered for Delivery \(K91\)](#): the system assigns this order type to delivery orders whose originating location is not Order Administration.
 - [Order Type for Retail Pickup Orders Brokered to OROMS \(K92\)](#): the system assigns this order type to retail pickup orders whose originating location is not Order Administration.
 - [Order Type for Delivery Orders Originating in OROMS \(M33\)](#): the system assigns this order type to delivery orders whose originating location is Order Administration. The system identifies the originating location as Order Administration if the `request_system_cd` in the fulfillments response message matches the system code in the OROB System (K50) system control value.
 - [Order Type for Retail Pickup Orders Originating in OROMS \(M35\)](#): the system assigns this order type to retail pickup orders whose originating location is Order Administration. The system identifies the originating location as Order Administration if the `request_system_cd` in the fulfillments response message matches the system code in the OROB System (K50) system control value.

The `transaction_type_id` in the fulfillments response message indicates whether the order is a retail pickup or delivery order.

- DELIVERY displays if the order is a delivery order.
- RETAILPICKUP displays if the order is a retail pickup order.
- SHIPFORPICKUP displays if the order is a retail pickup order that originated as a brokered ship-for-pickup order.
- order channel (Internet order): set to C. The `transaction_channel` specified in the fulfillments response message is not used.
- alternate order number: from the order number in the originating system, passed as the `order_id` from the fulfillments response (the external system's order number). The system stores this number in the *E-commerce order number* field in the Order Header Extended table. If the originating location is Order Administration, the system prefaces the alternate order number with `ORIG#:` 1234-001, where `ORIG#:` indicates the order was created as a result of OROB fulfillment assignment, 1234 is the order number, and 001 is the ship-to number.

Note:

The system identifies the originating location as Order Administration if the `request_system_cd` in the fulfillments response message matches the system code in the OROB System (K50) system control value.

- order date: the current date.
- entered date: the current date.
- *source code*:
 - If the order *did* originate in Order Administration:
 - * Use the [Order Broker Source Code \(K93\)](#), if specified; otherwise, if this system control value is blank,
 - * Use the source code, if any, specified for the store cross reference record for the originating location, which is based on the Originating Location to Pass to OROB (M32) system control value; otherwise,
 - * Use the source code passed in the fulfillments response message from Order Orchestration, which would be from the originating order.
 - If the order did *not* originate in Order Administration:
 - * Use the `source_code`, if any, passed in the fulfillments response message from Order Orchestration; otherwise,
 - * Use the source code, if any, specified for the store cross reference record for the originating location; otherwise,
 - * Use the Order Broker Source Code (K93), if specified; otherwise, if this system control value is blank,
 - * The order is created in error status because of the missing source code.

Customer Mapping and Updates

If the [ORCE Customer ID in OROB Fulfillment \(M72\)](#) system control value is NOT selected:

- customer number:

- if the `customer_no` passed in the fulfillments response is a valid customer number, then use this customer. For example, a `customer_no` of 13827 or 000013827 indicates sold-to customer 13827. Zero-filling the customer number is optional. Otherwise,
- if the `customer_no` passed is invalid, or if no `customer_no` was passed, then Order Administration uses standard name and address matching. See *Customer Sold To Selection, Creation and Update* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for more background.

 Note:

If the `customer_no` is invalid, the error is logged in Order Administration's `APP.log` file, even though the order can still be created successfully using the name and address information in the message.

 Note:

If the [Sold to Email Update for Orders Brokered to OROMS \(K96\)](#) or [Sold to Address Update for Orders Brokered to OROMS \(K97\)](#) system control values are selected, Order Administration updates the existing customer record with any changed information.

- email address updated? The [Sold to Email Update for Orders Brokered to OROMS \(K96\)](#) system control value indicates whether to update the customer's email address with the email address passed for the order.
- sold-to phone numbers: the `phone1` passed updates the customer's daytime phone number and the `phone2` passed updates the customer's evening phone number if the [Sold to Address Update for Orders Brokered to OROMS \(K97\)](#) system control value is selected. Any non-numeric characters passed in the phone numbers are stripped out.

If the [ORCE Customer Integration \(L37\)](#) system control value IS selected and the ORCE Customer ID in OROB Fulfillment (M72) is not selected:

- customer number:
 - *Matching customer number:* if the `customer_no` passed in the fulfillments response is a valid customer number, then use this customer. For example, a `customer_no` of 13827 or 000013827 indicates sold-to customer 13827. Zero-filling the customer number is optional.
 - * If the matching customer based on the customer number has an ORCE customer ID, update the customer and pass the update to Customer Engagement.
 - * If the matching customer based on the customer number does not have an ORCE customer ID, update the customer and pass the update to Customer Engagement, then update the customer with the ORCE customer ID returned from Customer Engagement.
 - *No matching customer number:* if the `customer_no` passed is invalid, or if no `customer_no` was passed, then Order Administration uses standard name and address matching. See *Customer Sold To Selection, Creation and Update* in the Order

Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for more background.

- Order Administration then passes the customer information to Customer Engagement, and updates the customer with the ORCE customer ID returned from Customer Engagement.

 Note:

If the `customer_no` is invalid, the error is logged in Order Administration's `APP.log` file, even though the order can still be created successfully using the name and address information in the message.

If the ORCE Customer Integration (L37) system control value IS selected and the ORCE Customer ID in OROB Fulfillment (M72) IS ALSO selected:

- *Matching customer based on ORCE customer ID:* If the ORCE customer ID is passed as the `customer_no`, and a customer with same ORCE customer ID is found, update the customer record if needed but do not send an update to Customer Engagement.
- *No matching customer based on ORCE customer ID:* If the ORCE customer ID is passed as the `customer_no`, but no matching customer based on the ORCE customer ID is found, call out to Customer Engagement to get the customer information based on the ORCE customer ID, and create the customer in Order Administration based on the response from Customer Engagement.
- *No customer_no passed:* Order Administration uses standard name and address matching. See *Customer Sold To Selection, Creation and Update* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for more background.
- Order Administration then passes the customer information to Customer Engagement, and updates the customer with the ORCE customer ID returned from Customer Engagement.

Additional customer information updates if not matching based on ORCE customer ID:

- sold-to name and address: the information passed in the fulfillments response message is used to create or update the customer; however, if the customer number passed in the fulfillments response is valid and the Sold to Address Update for Orders Brokered to OROMS (K97) system control value is unselected, the process does not update the customer information. If the customer does not already exist, the name is created in all upper case even if passed from Order Orchestration in upper and lower case.
- apartment or address line 4:
 - If the apartment tag is passed, the first 10 positions are saved as the sold-to apartment number.
 - If no apartment tag is passed, but an address line 4 is passed, the first 10 positions of address line 4 are saved as the sold-to apartment number.
 - If both the apartment tag and address line 4 are passed, then the first 10 positions of the apartment are saved as the sold-to apartment number, as indicated above, and address line 4 is saved as the fourth address line for the sold-to customer.
- email address updated? The Sold to Email Update for Orders Brokered to OROMS (K96) system control value indicates whether to update the customer's email address with the email address passed for the order.
- sold-to phone numbers: the `phone1` passed updates the customer's daytime phone number and the `phone2` passed updates the customer's evening phone number if the Sold to

Address Update for Orders Brokered to OROMS (K97) system control value is selected. Any non-numeric characters passed in the phone numbers are stripped out.

Ship-to Information

- ship complete?: from the `ship_complete` setting passed in the fulfillments response message; otherwise, from the [Ship Complete for Orders Brokered to OROMS \(L01\)](#) system control value.
- ship via: from the Order Broker Ship Via (K94) system control value if there is not a valid, numeric `ship_via` passed in the fulfillments response message. If the Order Broker Ship Via (K94) is blank, the [Default Ship Via \(A77\)](#) applies.
- gift order?: from the [Gift Flag for Orders Brokered to OROMS \(L03\)](#). This system control value overrides the setting passed in the fulfillments response message.
- freight charges: from the `freight_amount` specified in the fulfillments response message, if any; otherwise, Order Administration calculates freight. If an additional freight charge is specified for the ship via, Order Administration adds it to the order.
- tax: the total of the detail-level tax `amount` passed in the fulfillments response message for each item, plus any tax calculated based on freight and handling charges. The order-level tax amount passed in the message is not used to build the order.
- freight tax override: always selected, regardless of the setting of the [Tax on Freight \(B14\)](#) system control value.
- purchase order number: from the `ref_transaction_no` passed in the fulfillments response message. Displayed at the [Display Order Properties Screen](#) in standard order inquiry and at the [Third Streamlined Order Inquiry Screen \(Order Summary\)](#).
- warehouse: If the Send Inventory by Warehouse to OROB (L06) system control value is selected, this is based on the OROB location for the warehouse sending the fulfillments request message.
- delivery type (retail pickup or delivery): from the `transaction_type_id` specified in the fulfillments response message. SHIPFORPICKUP transaction types map to a retail pickup delivery type.
- ship-to name and address: from the `ship_to` information for the first item on the order; the ship-to information for any additional item(s) is not used. Creates an Order Ship To Address record, which you can review at the [Display Alternate Address Screen](#). The one-time ship-to phone number is from the `phone1`, if any, for the first item. If no `phone1` is passed for the first item, then the `phone2` for the first item is used. For a retail pickup order, the ship-to name and address should specify the name and address of the originating store location. The process creates a one-time ship-to address. If the customer does not already exist, the name is created in all upper case even if passed from Order Orchestration in upper and lower case.
- **store location and system:**
 - `location_cd`: the location fulfilling the order. This is the fulfilling, or sourced, location. For delivery and retail pickup orders, this is always an Order Administration warehouse. This is the Store # for the Store Cross Reference record.
 - `system_cd`: Order Administration. This is the OROB System (K50).
 - `request_location_cd`: the location generating the order. This is the originating, or placed, location. This can be a store location or an Order Administration warehouse if the original order was from Order Administration and was brokered for fulfillment assignment. This is the Store # for the Store Cross Reference record.

- request_system_cd: If the order originated in a store, this is the code identifying your POS system, from the System Code, if any, for the Store Cross Reference record; otherwise, from the [Name in OROB for Point of Sale \(L09\)](#). If the order originated in Order Administration, from the System Code, if any, for the Store Cross Reference record; otherwise, from the OROB System (K50).
- **ship-for-pickup location and system:**
 - location_cd: the store location where the customer picks up a ship-for-pickup order. This is the pickup location. From the Store # for the Store Cross Reference record.
 - system_cd: The code identifying your POS system, from the System Code, if any, for the Store Cross Reference record; otherwise, from the Name in OROB for Point of Sale (L09).

Detail Information

The process creates an order detail line for each item passed in the fulfillments response message. Also:

- price: the `unit_price` from the fulfillments response message. Order Administration does not recalculate the price.
- price override reason code: from the Order Broker Price Override (K95) system control value.
- requesting system line number: from the `requesting_system_line_no` passed in the fulfillments response message. Identifies the line number in the originating system.
- quantity: the `qty` from the fulfillments response message.
- gift wrap: from the `order_line_gift_wrap` flag setting passed in the fulfillments response message. The gift wrap charge specified in the Item Offer, multiplied by the unit quantity, is included in the *Handling* bucket.
- order line messages: from the `order_line_message` passed in the fulfillments response message:
 - If the message passed exceeds the field length of 60 positions, the message is continued on an additional message line.
 - The *Print* flag for the message lines is set to B (both invoices and pick slips).
- customization: customization is created for an order line only if:
 - the Item Offer associated with the source code on the order header specifies an additional charge code for a custom special handling format that includes a single line of customization instructions, and
 - the `customizations` element in the message specifies a `customization_code` and `customization_message`

If:

 - there is no custom special handling format specified for the Item Offer, the information from the `customization_code` and `customization_message` are saved as Order Line Messages, with a *Print* flag of P (Picks), and the order is not suspended with an error.
 - the special handling format detail specifies any valid responses, and the customization message passed is not one of the responses, the order is suspended with an error of `Input not valid response`
 - the special handling format detail specifies a *Max # characters*, and the customization message passed exceeds this length, the order is suspended with an error of `Exceeds max character`

 Note:

- Order Administration does not validate that the `customization_code` matches the *Field label* for the special handling format detail.
 - Custom special handling formats that include more than one detail line are not currently supported for retail pickup and delivery orders received from Order Orchestration.
 - Regardless of whether Order Administration creates custom special handling for an order line, any `order_line_customization_charge` is still applied to the *Handling* bucket on the order.
 - The [Evaluate Special Handling Charges by Order Line \(D67\)](#) system control value determines whether to multiply the customization charge passed in the message by the unit quantity.
- Tax amount: from the `tax amount` passed for the item in the fulfillments response message. Order Administration does not recalculate tax for items.

 Note:

Only the tax amounts passed at the detail level are added to the order in Order Administration; the `transaction_tax` from the fulfillments response message header level is not used.

Payment Information

- pay type: from the [Order Broker Payment Type \(K98\)](#).
- credit card number: From the description of this pay type.
- suppress deposit flag: set to Y.
- suppress refund flag: set to Y.

 Note:

The tender information, if any, passed in the fulfillments response message is not used.

Order Messages

- originating store location: written as an Order Message, for example: Originating Store: 317.
- request ID: written as an Order Message, for example: OROB Request ID: 123456. This information is also saved in the Order Orchestration record.
- special instructions: the `special_instructions` at the Order level from the fulfillments response message are written as an Order Message in capital letters, for example: ADD MONOGRAM HEB.

- additional order messages: the `order_message` is written as one or more Order Message lines:
 - If the message passed exceeds the field length of 60 positions, the message is continued on an additional message line.
 - The *Print* flag for the message lines is set to B (both invoices and pick slips).

**Note:**

Special instructions passed at the item level in the fulfillments response message are not retained.

See the Fulfillments Response Message Sample in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for an example.

Additional Information on Mapping

If any of the information passed in the fulfillments response message exceeds the maximum field length in Order Administration, the information is truncated.

Order count and demand updates: If the originating location is Order Administration, the system does not increase the order count that is displayed on the [About Application Screen](#) or perform any demand updates for the delivery or retail pickup order.

**Note:**

The system identifies the originating location as Order Administration if the `request_system_cd` in the fulfillments response message matches the system code in the OROB System (K50) system control value. In this situation, the system prefaces the *E-commerce order number* in the Order Header Extended table with `ORIG#: 9999-001`, where `ORIG#:` indicates the order was created as a result of OROB fulfillment assignment, 9999 is the order number, and 001 is the ship-to number.

Not mapped: The following information is not mapped from Order Orchestration when creating the order in Order Administration:

- order additional freight charges
- order additional charges
- the setting of the *Under Review* flag
- order line extended freight
- the setting of the order line *Ship Alone* flag
- order line ship weight
- item UPC or EAN codes

Response messages: After receiving the fulfillments response message, depending on whether it was able to create the order successfully:

- *order creation successful:* The BROKER process sends a status update message with a status of Accepted.
- *order created on hold:* The BROKER process sends a status update message with a status of Polled.

- *order in error*: If the [Re-Polling for Orders Brokered to OROMS \(L04\)](#) system control value is:
 - selected: the BROKER process sends a status update message with a status of Polled
 - unselected: the BROKER process does not send a status update messageAlso, if the order is in error, it is assigned to the Order Broker Error Batch Number (K90).
- *order cannot be created*: If the BROKER process cannot create the order in Order Administration, it sends a status update with a status of *Rejected*.

Order Orchestration record: The process creates an Order Orchestration record regardless of whether the order is in error. The initial status of the Order Orchestration record is New if there are any errors; otherwise, it is In process.

Canceled by originating system? If the order is initially created in Order Administration in error status and then corrected, Order Administration sends an inquiry request to Order Orchestration before changing the order's status to open. If the response from Order Orchestration indicates that the originating system has canceled the order, Order Administration then puts the order on hold and writes an order transaction history message, such as: Order held - line[s] canceled in Order B.

Changing the order in batch order entry: If the order is suspended or in error, you can use batch order entry to make changes to the order, although you cannot add an order line. Once the order is in held or open status, the restrictions described under [Maintaining Retail Pickup or Delivery Orders from the Order Orchestration](#) apply.

Retail Pickup (including Ship-for-Pickup) or Delivery Processing after Order Creation

Checking for canceled or under review retail pickup or delivery orders during pick slip generation: Pick slip generation sends an inquiry to Order Orchestration for all retail pickup and delivery orders eligible for pick slips based on their current status, item availability, and the pick slip selection criteria, to determine whether an eligible order has been canceled in the originating system.

When the response indicates that an order is in canceled status, the program does not generate a pick slip for the order; instead, it puts the order on hold using the Order Broker Hold Reason (Cancel) (L02) system control value.

When the response indicates that an order is under review, the program does not generate a pick slip for the order; instead, it puts the order on hold using the AU hold reason (BROKER ORDER UNDER REVIEW).

Otherwise, Order Administration puts the Order Orchestration record into Picking status when the pick slip is printed and sends a status update message to Order Orchestration indicating that the order or line is in Picked status. Note that this occurs regardless of whether communication with Order Orchestration is successful when pick slip generation sends the inquiry.

Note:

Pick slip generation does not check that the sourcing location for the order is still set to an Order Administration location. For example, a user in Order Orchestration may have changed the sourcing location for the order to a location other than an Order Administration location. In this situation, Order Administration will still generate a pick slip for the order.

Which status request message? Pick slip generation uses the order inquiry status request only if the [Use OROB Status Inquiry List Web Service \(M05\)](#) system control value is set to NO or blank; otherwise, it uses the order status list request. See [Use OROB Status Inquiry List Web Service \(M05\)](#) for details on how Order Administration confirms whether to generate a pick slip for retail pickup and delivery orders.

Streamlined allocation? If there are any retail pickup or delivery orders eligible for pick slip generation, the program can use streamlined allocation only when it uses the status list request. See [Use Streamlined Allocation \(L63\)](#) for background.

Sample messages: See the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

Shipment confirmation: Once the shipment is confirmed, the Order Orchestration record status changes to Intransit for a retail pickup order, or Completed for a delivery order. The corresponding statuses for the orders in Order Orchestration are Intransit and Fulfilled.

Status updates after shipment of a retail pickup order: Once the Order Orchestration record for a retail pickup is in Intransit Polled status, the order status in Order Administration is X (completed); however the requesting store location still needs to receive the order, notify the customer, and have the customer pick up the order.

Deactivating the payment method: When you ship a retail pickup or delivery order, the billing async job deactivates the payment method. Once the payment method is deactivated, you cannot process a refund against the order unless you add a new payment method.

Sending the ship via and tracking number to Order Orchestration: When you confirm shipment, the BROKER process sends a message to Order Orchestration. The information includes the description of the ship via used (even if it is different from the ship via on the order) and the tracking number, if available.

This information is available for review in Order Orchestration at the Order screen. The actual ship via used and tracking number used are displayed on the History tab.

Status inquiry: The BROKER process includes shipped retail pickup orders in order status inquiry list requests just once a day. The Order Orchestration record might be put in any of the following statuses:

- Received: indicates that the originating store has received the transfer.
- Completed: indicates that the customer has picked up the order.
- Partially fulfilled: indicates that the customer has picked up part of the order.

See [Setting the Daily Status Inquiry Time Window \(all versions\)](#) for more information.

Other status updates after order creation:

Order Orchestration integration supports a business process in which only the originating location cancels a retail pickup or delivery order, since the customer is not necessarily aware that the distribution center can be involved in order fulfillment. As a result:

- Sell out: If you sell out an order line, either in order maintenance or through the Process Auto Soldouts option, Order Administration sends a status update to Order Orchestration indicating the order or order line (based on whether you split orders) was Rejected. Order Orchestration then attempts to reassign the order or line to another location for fulfillment. The Order Orchestration record's status in Order Administration changes to Rejected.
- Cancel: If you cancel an order or order line, Order Administration changes the Order Orchestration record's status to Canceled and sends a status inquiry request to Order Orchestration. If the order's status in Order Orchestration is:

- Canceled: Order Administration does not send a status update to Order Orchestration; otherwise,
- If the order's status in Order Orchestration is anything but Canceled, Order Administration sends a status update to Order Orchestration indicating the order was Rejected. In this situation, if Order Orchestration is configured to "reshop" the order and there are any other possible fulfilling locations, Order Orchestration reassigns the order to the next possible location based on the fulfillment rules set up in Order Orchestration, and the order returns to new order status; otherwise, if Order Orchestration cannot "reshop" the order, the order is assigned to the OROB Default Location Code for Unfulfillable Orders (K56), and the order status is unfulfillable.

You cannot cancel a partial quantity of an order line on a retail pickup or delivery order.

Note:

Although Order Administration does not prevent you from canceling a retail pickup or delivery order, some business processes require that only the originating location can cancel an order. In this situation, if the customer contacts the call center to cancel the order, the operator notifies the originating store location and requests that the store perform the cancellation and trigger the status update to Order Orchestration. Using this process, Order Administration receives notification of the cancellation the next time it sends a periodic status inquiry on the order to Order Orchestration, and then holds the entire order (even if only one line was canceled) using the Order Broker Hold Reason (Cancel) (L02).

- Voiding a pick slip for a retail pickup or delivery order: If the Cancel Reason (Pick In) (L86) system control value specifies a valid cancel reason or if a backorder cancellation reason code is specified in the *CWPickIn XML Message*, and you use the generic pick in API to void a pick slip for a retail pickup or delivery order, then Order Administration cancels the order and sends a status update to Order Orchestration to reject the order. Otherwise, if the system control value is blank, you need to use order maintenance to cancel the order and send the status update to Order Orchestration.

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

- Rejecting the order: If you reject a batch that includes a retail pickup or delivery order, the BROKER process sends a status update rejecting the order; also, it deletes the related Order Orchestration and Order Orchestration History records.

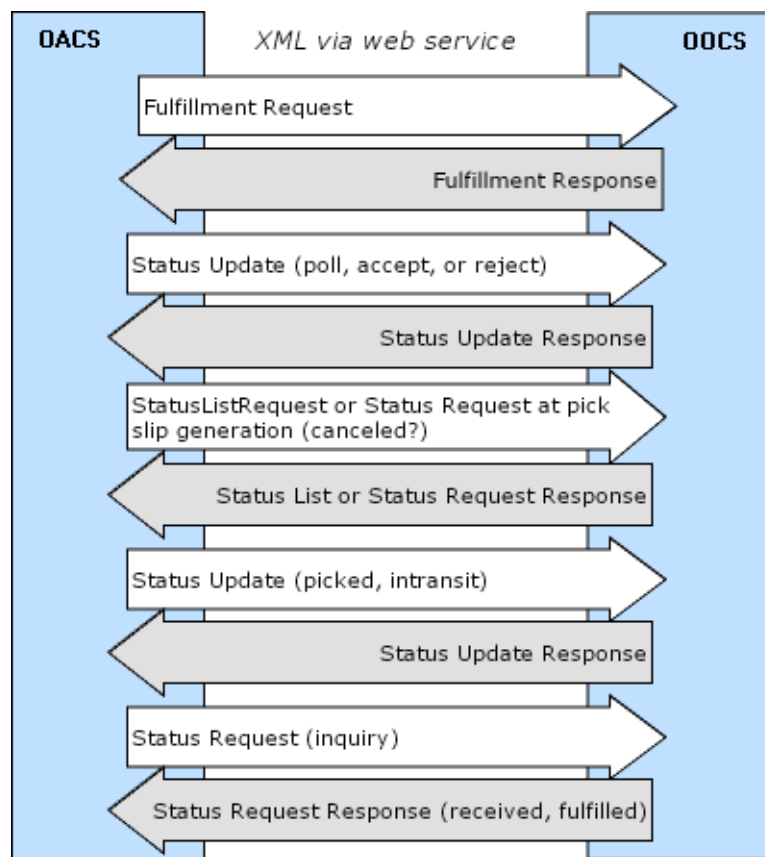
Cancel reason sent? The status update message to reject a retail pickup or delivery order includes a cancel reason code and description if you:

- cancel the order in order maintenance: the entered cancel reason is sent
- void the pick slip: the Cancel Reason (Pick In) (L86) system control value is sent if a backorder cancellation reason code is not specified in the *CWPickIn XML Message*,

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

- reject the batch that includes the retail pickup or delivery order: no cancel reason is sent

For more information: See the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for a sample of the information sent to Order Orchestration when you cancel a retail pickup or delivery order.



Reviewing Retail Pickup (including Ship-for-Pickup) or Delivery Orders in Order Inquiry

In addition to reviewing information through the [Working with Order Broker \(WOBR\)](#) menu option, you can also use standard order inquiry. Your options include:

- Finding the order number: Use the *Order cross ref #* at the [Order Inquiry Scan Screen](#) to find a retail pickup or delivery order based on the order number in the originating system. This number also displays as the *Alt ord* number at the [Display Order Properties Screen](#). The system stores the originating order number in the *E-Commerce order number* field in the Order Header Extended table. If the originating system is Order Administration, the system prefaces the originating order number with the text `ORIG#:`. For example: `ORIG#: 9999-001`, where `ORIG#:` indicates the order originated in Order Administration, 9999 is the original order number in Order Administration, and 001 is the ship-to number.

Note:

To review all retail pickup and delivery orders whose originating system is Order Administration, you can enter `ORIG#:` in the *Order cross ref #* field and select OK to advance to the Scan by Order Cross Reference # screen where all orders whose *E-Commerce order number* in the Order Header Extended table begin with `ORIG#:` display.

- Originating order message: If the *E-Commerce order number* in the Order Header Extended table begins with the text `ORIG#:`, indicating the originating system for a retail pickup or delivery order is Order Administration, the message *This order is fulfilling another order: 9999-001* displays for the sourcing order, where 9999 is the originating

order number in Order Administration, and 001 is the ship-to number. This message displays on the Order Inquiry Header screen (OIOM), Order Inquiry Detail screen (OIOM), and in Streamlined Order Inquiry (DORI) for the sourcing order.

- Broker detail and history: Use the [Display Order Broker Details Screen](#) to review Order Orchestration Detail and Order Orchestration History, as well as other information such as the delivery type and the request ID.
- Identifying the Order Orchestration type: In addition to the [Display Order Broker Details Screen](#), you can also review the Broker delivery type at the [Display Order Properties Screen](#) and the [Display Order Broker Details Screen](#) to determine whether the order originated as a Retail Pickup or Delivery order.
- Originating store, request ID, and special instructions: The originating store number and request ID are available for review at the [Work with Order Messages Screen](#), for example:

Originating Store: 317

OROB Request ID: 70122

Also, if any special instructions were passed for the order, this information is also available for review at this screen.

- Order history: The [Display Order History Screen](#) displays activity related to sending status updates to and from Order Orchestration, such as:
 - Ln#: 1 Ready for Fulfillment: Written for each line received on a retail pickup or delivery order when the order is accepted and put into Open or Held status.
 - Ln#: 1 Selected for Fulfillment: Written for each line printed on a pick slip.
 - Ln#: 1 Fulfilled: Written for each delivery order line when you confirm shipment.
 - Ln#: 1 In Transit: Written for each retail pickup order line when you confirm shipment.

Note:

After you ship a retail pickup order, Order Administration checks for status updates on a daily basis, and writes a single Order Transaction History message for each status change until the order is fulfilled. See [Setting the Daily Status Inquiry Time Window](#) (all versions) for setup information.

- Ln#: 1 Store Received: Written after the originating store location has received a retail pickup order.
- Ln#: 1 Customer Partial Pick Up: Written after the customer has picked up part of a retail pickup order.
- Ln#: 1 Customer Picked Up: Written after the customer has picked up all units of a retail pickup order.
- Ln#: 1 Cancel Acknowledged by Broker: Written when you cancel an order line in order maintenance or through [Working with Backorders Pending Cancellation \(WBPC\)](#).
- Ln#: 1 Rejected for Fulfillment: Written when Order Administration rejects an order line because the item is soldout or backordered; if you reject the order when it is suspended; or when you sell out a line afterward in order maintenance or through [Processing Auto Soldout Cancellations \(MASO\)](#).
- Order held - line[s] canceled in OROB: Written if Order Orchestration responds to a status inquiry indicating that any of the lines on the order were canceled. In this

situation, Order Administration puts the order on hold using the Order Broker Hold Reason (Cancel) (L02).

Things to Note about Retail Pickup (including Ship-for-Pickup) and Delivery Orders

Both system control values required: You need to complete both the Type for Orders Brokered for Delivery (K91) and the Order Type for Retail Pickup Orders Brokered to OROMS (K92) system control values in order for Order Administration to request new orders from Order Orchestration, even if you do not process both order types.

In addition:

- if the Use OROB for Fulfillment Assignment (M31) system control value is selected, you need to complete the Order Type for Delivery Orders Originating in OROMS (M33) system control value in order for Order Administration to assign the correct order type to delivery orders created as a result of the [Brokered Backorders](#) process assigning an Order Administration warehouse to fulfill a brokered backorder.
- if the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to ALWAYS, you need to complete the [Order Type for Retail Pickup Orders Originating in OROMS \(M35\)](#) system control value in order for Order Administration to assign the correct order type to retail pickup orders created as a result of the [Brokered Backorders](#) process assigning an Order Administration warehouse to fulfill a brokered backorder on a ship-for-pickup order.
- if the Send Inventory by Warehouse to OROB (L06) system control value is selected but the OROB location for a warehouse does not specify a valid location in Order Orchestration, the fulfillments request message is not generated.

Discounts: If the customer is eligible for a discount, such as one from a loyalty membership, Order Administration still applies the discount to a retail pickup or delivery order.'

Additional freight: If the ship via on the order is subject to additional freight charges, these charges are added to the order.

Gift flag: The setting of the Gift Flag for Orders Brokered to OROMS (L03) system control value overrides the setting of the *gift* flag passed in the fulfillments response message.

Outbound invoice message: If you generate the CWInvoiceOut message, the message is generated for retail pickup or delivery orders unless excluded based on trigger rules (for example, not including these order types).

Tax: The tax amount for each order detail line is passed as a tax override amount.

Customer matching: If the fulfillments response message from Order Orchestration does not specify a valid sold-to customer number, Order Administration uses its standard customer name and address matching to either select an existing customer or create a new customer.

Oracle Retail Customer Engagement customer integration: If you use the [Customer Engagement Customer Integration](#), Order Administration may also new customer records in Oracle Retail Customer Engagement as part of creating retail pickup and delivery orders. See [Building the Retail Pickup \(including Ship-for-Pickup\) or Delivery Order](#) for more information.

Order maintenance: The [Maintain Brokered Fulfillment Orders \(B20\)](#) secured feature controls the ability to maintain a retail pickup or delivery order. Even if you have authority under this secured feature, your ability to maintain the order is limited. For example, you cannot add or change an order line. See [Maintaining Retail Pickup or Delivery Orders from the Order Orchestration](#) for a discussion.

Creating the invoice for a ship-for-pickup order: The [Invoice Ship For Pickup Order Once Intransit \(M73\)](#) system control value controls whether to create the invoice for a ship-for-pickup

order when Order Orchestration indicates that the order is now in transit or received. See that system control value for more information.

If the payment method expires: If the payment method for an order expires, the system sends an update to Order Orchestration indicating to put the order Under Review. Also, if a fulfilling retail pickup order was created for the originating order, the order goes on hold, and any open pick slips are canceled.

Processing returns: If the [Suppress Returns for Retail Pickup/Delivery \(L88\)](#) system control value is:

- selected: You cannot process a return against a retail pickup or delivery order, or create a return authorization
- unselected: You can process a return against a retail pickup or delivery order or create a return authorization; however, the Order Broker Payment Type (K98) is deactivated when you ship a retail pickup or delivery order. As a result, in order to process a return against the order, you need to add a new payment method.

 Note:

Regardless of the setting of the Suppress Returns for Retail Pickup/Delivery (L88) system control value, you cannot process an exchange against a retail pickup or delivery order, enter an item with a negative quantity, enter a negative additional charge, or apply a discount to a shipped order line.

Order Administration does not send a status update to Order Orchestration when you process a return against a retail pickup or delivery order.

Membership items: You should not set up your Order Orchestration integration to include membership items on retail pickup or delivery orders, since the customer membership would not be created correctly in Order Administration. To prevent Order Administration from sending membership items to Order Orchestration as part of [Order Orchestration's Product, Product Location, and Incremental Inventory Import Process](#), do not flag them as *O ROB eligible*.

Voiding or reprinting pick slips:

- If you use [Reprinting and Voiding Pick Slips \(WVRP or WSVP\)](#) to void or reprint a pick slip for a retail pickup or delivery order, this activity does not produce a status update to Order Orchestration.
- If you use the *Generic Pick In API (Shipments, Voids, and Backorders)* to void a pick slip for a retail pickup or delivery order and the Cancel Reason (Pick In) (L86) system control value specifies a cancel reason code, or if a backorder cancellation reason code is specified in the *CWPickIn XML Message*, Order Administration cancels the order using the specified cancel reason and sends a status update rejecting the order to Order Orchestration, including the cancel reason from the system control value.

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

 Important:

To prevent inconsistent updates to Order Orchestration for retail pickup and delivery orders:

- Prevent Order Administration from generating multiple pick slips for a single retail pickup or delivery order:
 - Select the Ship Complete for Orders Brokered to OROMS (L01) system control value.
 - Do not create retail pickup or delivery orders for ship-alone items.
 - Do not select the Retain Backordered Lines Brokered to OROMS (K89) system control value.
- Do not process void/unreserve transactions or partial backorders for these orders through the *Generic Pick In API (Shipments, Voids, and Backorders)*; confirm or void the entire pick slip.

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

 Note:

Retail pickup and delivery orders that originate in Xstore include a single item.

Documents for store receiving: In order to support store receiving, you can generate the Pick Message from Order Administration (CWPickOut) or the *PO Download XML Message (CWPurchaseOrderOut)*. Each of these messages includes details on the order, including the Order Orchestration request ID, the order number in the originating system, and the delivery type. See the *Generic Pick Out API* and the *Generic Outbound Purchase Order API* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for more information.

For more information: See [Reauthorization and Under Review Hold Scenarios for Orders Fulfilled through Order Orchestration](#).

Ship-for-Pickup Orders

Overview: You can use the ship-for-pickup option in the [Order Orchestration Integration](#) to send the merchandise for an order to a designated store, where the customer can pick it up. The Order Orchestration integration facilitates communication between Order Administration and the designated store location, so the store receives notification that the order is in transit, and sends notification back to Order Administration after the merchandise is received and when the customer picks up the order.

The items on the order do not need to be stocked in the store. In addition, the [Use OROB for Ship for Pickup Fulfillment Assignment \(M34\)](#) system control value controls whether Order Administration fulfills the order or whether the order is sent to Order Orchestration for fulfillment assignment.

- If this system control value is set to NEVER, Order Administration fulfills the order and sends the items on the order to the store selected for customer pick up. In this situation, if

an item on the order is not in stock, the item is placed on backorder until it can be fulfilled by Order Administration. The order can include up to two locations for processing:

- the originating, or placed, location that creates the order. For ship-for-pickup orders, the originating location is always an Order Administration warehouse.
 - the fulfilling, or sourcing, location that provides the inventory for the order. If the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to NEVER, this is always an Order Administration warehouse.
 - the pickup location where the customer picks up the items on the order. For ship-for-pickup orders, this is always the store location the customer selected for pickup.
- If this system control value is set to ALWAYS, the system sends the order to Order Orchestration for fulfillment assignment. In this situation, Order Orchestration determines the best location to fulfill the order and the order can include up to three locations for processing:
 - the originating, or placed, location that creates the order. For ship-for-pickup orders, the originating location is always an Order Administration warehouse.
 - the fulfilling, or sourcing, location that provides the inventory for the order. If the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to ALWAYS, this is the location Order Orchestration selected for fulfillment of the order. This location can be a store location or an Order Administration warehouse.
 - the pickup location where the customer picks up the items on the order. For ship-for-pickup orders, this is always the store location the customer selected for pickup.

If Order Orchestration determines that Order Administration is the best location to fulfill the order, the system creates a new retail pickup order in Order Administration to fulfill the ship-for-pickup order; see [Retail Pickup \(including Ship-for-Pickup\) or Delivery Orders](#)

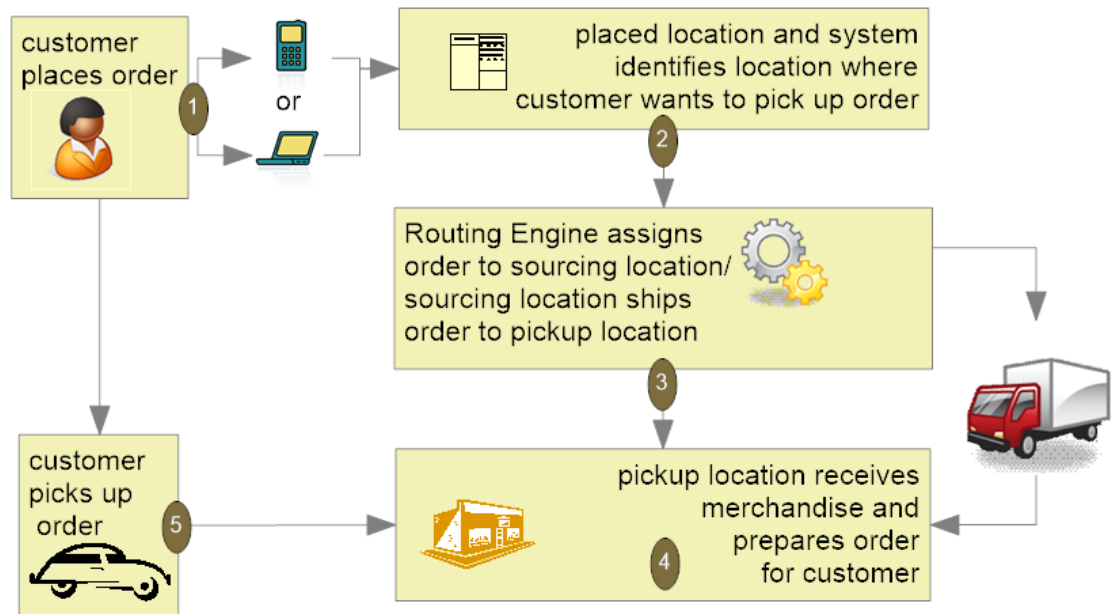
Important:

Regardless of when you send ship-for-pickup orders to Order Orchestration, in order to use ship-for-pickup processing, you must select the *Enable Ship For Pickup* option on the Organization window in Order Orchestration. Once you enable ship for pickup, the *Ship for Pickup Enabled Date* displays on the Organization window and this option cannot be changed.

Examples: Examples of ship-for-pickup include the following.

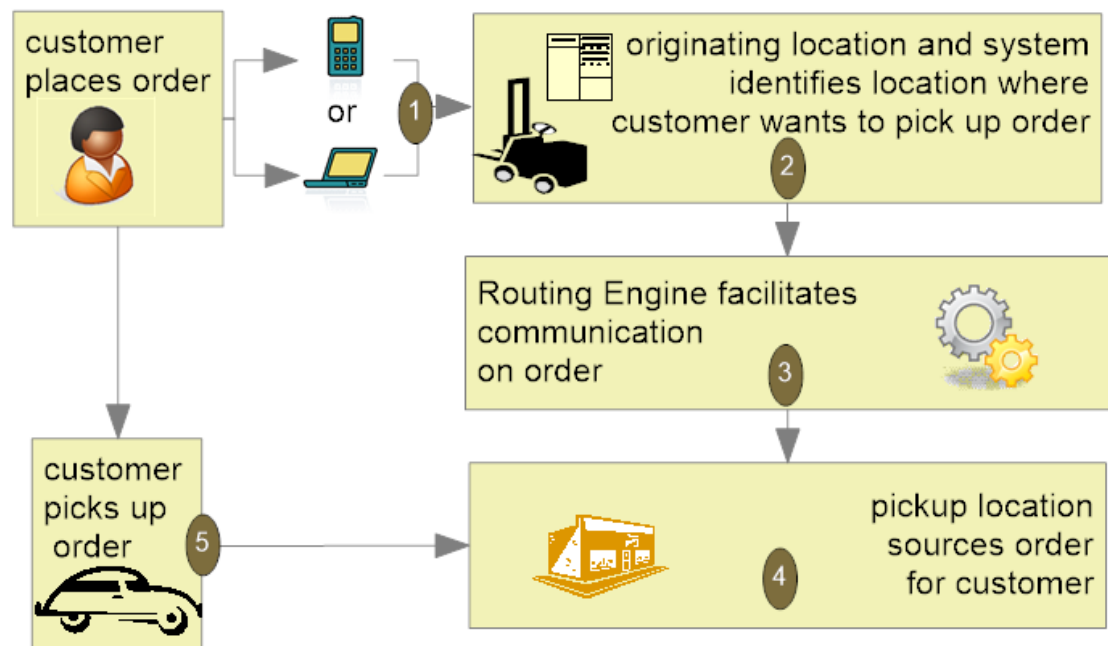
Example 1 (three different locations):

The customer places an order on the web site (originating location A, Order Administration) and wants to pick the order up at store location B. Order Orchestration selects store location C as the fulfilling, or sourcing, location. Store location C ships the inventory to store location B, where the customer can pick it up.



Example 2 (fulfilling location and pickup location are the same):

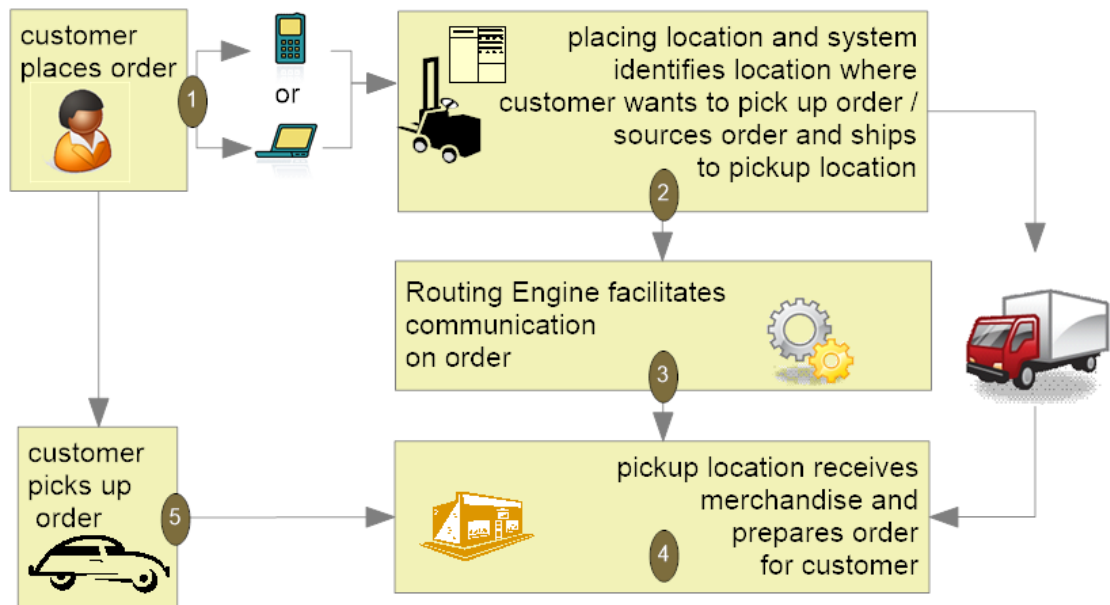
The customer places an order on the web site (originating location A, Order Administration) and wants to pick the order up at store location B. Order Orchestration selects store location B as the fulfilling, or sourcing, location. Once the order is ready at store location B, the customer can pick it up.



Example 3 (originating location and fulfilling location are the same):

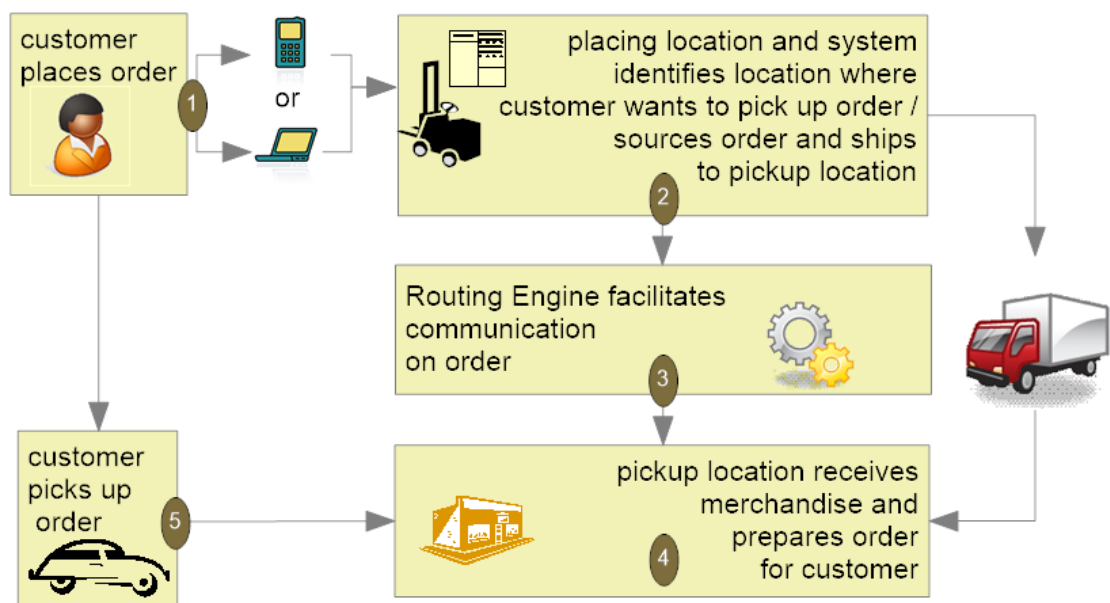
The customer places an order on the web site (originating location A, Order Administration) and wants to pick the order up at store location B. Order Orchestration selects warehouse

location A, Order Administration, as the fulfilling, or sourcing, location. Order Administration ships the items on the order to store location B. Once the order is ready at store location B, the customer can pick it up.



Example 4 (originating location and fulfillment location are the same; items on the order are shipped to the store during pick slip generation/drop ship processing):

The customer places an order on the web site (originating location A, Order Administration) and wants to pick the order up at store location B. Order Administration fulfills the items on the order and during pick slip generation, ships the items on the order to store location B. Order Orchestration manages communication between Order Administration and store location B. Once the order is ready at store location B, the customer can pick it up.



Version compatibility: Fulfillment assignment and ship-for-pickup functionality is available in release 16.0 or higher of Order Management System, or Order Administration, and release 16.0 or higher of Order Broker, or Order Orchestration. Also, in order to use ship-for-pickup processing, you must select the *Enable Ship For Pickup* option on the Organization window in Order Orchestration. Once you enable ship for pickup, the *Ship for Pickup Enabled Date* displays on the Organization window and you cannot deselect this option.

An [OROB_MESSAGE_VERSION](#) of 16.0 or higher is required to use the [Ship-for-Pickup Orders](#) integration with Order Orchestration. Note that this property cannot be set higher than 19.9 for integration with Order Broker 19.x, or higher than 21.1 for integration with Order Orchestration 22.2.301.0 or higher.

In this topic:

- [Creating a Ship-for-Pickup Order in Order Administration](#)
- [Communicating with Order Orchestration about a Ship-for-Pickup Order](#)
- [Special Ship-for-Pickup Orders](#)
- [Collect Payment for a Ship-for-Pickup Order at the Store?](#)
- [Updates to a Ship-for-Pickup Order in Order Administration](#)
- [Ship-for-Pickup Order Processing on or after Shipment](#)
- [Reviewing a Ship-for-Pickup Order in Order Inquiry](#)

Creating a Ship-for-Pickup Order in Order Administration

You can create a ship-for-pickup order through interactive order entry, or through the order API.



Note:

A ship-for-pickup order should have a single ship-to.

Creating a Ship-for-Pickup Order in Order Entry

Ship-for-pickup orders originate in Order Administration, either through order entry or through the generic order API. The order creation process is similar to that of a regular order, except that a ship-for-pickup order includes a one-time ship-to address representing the store location.

To select the store location in order entry:

1. Select the One Time Ship To option.
2. At the [Create One Time Ship To Address Screen](#), select Store.
3. Select a store at the [Store Location Screen](#). This screen displays each store location set up through [Work with Store Cross Reference \(WSCR\)](#) whose *Ship for Pickup* flag is selected. The description and address set up for the Store Cross Reference default to the Create One Time Ship To Address screen.
4. Complete entry of the order.
 - If the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to NEVER, the system uses existing logic to reserve items in order to fulfill the ship-for-pickup order from an Order Administration warehouse. See [Sending a Ship-for-Pickup Order to Order Orchestration during Pick Slip Generation and Drop Ship Order Processing](#).

- If the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to ALWAYS and the [Send B/O to OROB \(K08\)](#) system control value is selected, the system bypasses reservation and places all eligible items on backorder, even if the item is available in an Order Administration warehouse, in order to send all eligible items to Order Orchestration for fulfillment assignment; see [Rules for Submitting Backorders to Order Orchestration](#). Order Orchestration will choose the best store location or Order Administration location to fulfill and ship the item to the store location selected by the customer for store pickup. See [Brokered Backorders](#) for processing details.

**Note:**

To avoid shipment problems, once you accept a ship-for-pickup order, the system does not allow you to change the store selected as the one-time ship-to address; in order to change the pickup store location, you must cancel the order and create a new ship-for-pickup order.

Ship-alone items on ship-for-pickup orders: If an item is flagged as Ship alone, Order Administration does not let you enter an order line on a ship-for-pickup order with a quantity greater than one. If the customer wants more than one unit, enter a separate order line for each unit. This restriction applies even if the item is not flagged as [OROB eligible](#).

Creating a Ship-for-Pickup Order through the Generic Order API

In the *Inbound Order XML Message (CWORDERIN)*:

- use the `store_code` attribute to specify the store location code. This needs to be a store location set up through Work with Store Cross Reference (WSCR), as described above for order entry.
- specify a `delivery_type` of S
- use the `ShipTo` element in the *Inbound Order XML Message (CWORDERIN)* to specify the shipping address of the store, or leave the shipping name and address attributes blank in order to use the information set up in the Store Cross Reference record.

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

Name and address for ship-for-pickup order: If the ship-to name and address fields are passed for a ship-for-pickup order, these fields should indicate the shipping address of the store selected for pickup; otherwise, if no ship-to name and address is passed, the information defaults from the Store Cross Reference record.

Partial ship-to address? The name or address fields from the Store Cross Reference record default for any fields not passed in the message.

Example: If the CWOOrderIn message indicates the ship-to customer's first and last name, this information defaults to the order, in addition to the company name and address from the Store Cross Reference record.

Communicating with Order Orchestration about a Ship-for-Pickup Order

Submitting the order to Order Orchestration: The setting of the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value controls when the order is submitted to Order Orchestration.

The system submits a ship-for-pickup order to Order Orchestration for fulfillment assignment when the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to ALWAYS and the Send B/O to OROB (K08) system control value is selected, and:

- You create an order that contains an eligible item in interactive order entry or through the generic order interface (Order API).
- You run the [BROKER Periodic Function](#) to find eligible items to send to Order Orchestration.

See [Brokered Backorders](#) for processing details.

The system submits a ship-for-pickup order to Order Orchestration during pick slip generation or drop ship purchase order processing in the following scenarios.

- When the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to NEVER or blank, or
- When the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to ALWAYS but the Send B/O to OROB (K08) system control value is unselected.

See [Sending a Ship-for-Pickup Order to Order Orchestration during Pick Slip Generation and Drop Ship Order Processing](#) for processing details.

Sending a Ship-for-Pickup Order to Order Orchestration during Pick Slip Generation and Drop Ship Order Processing

Submitting the order to Order Orchestration: The system submits a ship-for-pickup order to Order Orchestration when you generate the pick slip or drop ship purchase order in the following scenarios.

- When the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to NEVER or blank.
- When the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to ALWAYS but the Send B/O to OROB (K08) system control value is unselected.

At this time, the system also creates the Order Orchestration record displayed at the [Work with the Order Orchestration Screen](#).

Which items are included in the Submit Order message? Only items that are flagged as [OROB eligible](#) are included in the message to Order Orchestration. However, all items that print on the pick slip or purchase order can be included in the shipment to the store location.



Note:

It is important to confirm that including additional items on the pick slip or purchase order and in the shipment will not present a problem to the store receiving the ship-for-pickup order.

No items OROB eligible? If you create a ship-for-pickup that does not include any [OROB eligible](#) items, Order Administration does not submit the order to Order Orchestration or create an Order Orchestration record; however, you can still generate the pick slip or drop ship purchase order and ship the order to the store location for customer pickup. It is important to note that, in this case, the selected store does not receive advance notification of the order.

For more information on the contents of the message, see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

Submit separate orders for each order line? If the [Create Separate Picks for Ship for Pickup Orders \(L89\)](#) system control value is selected, Order Administration generates a separate pick slip or drop ship purchase order for each item, and as a result, submits each order line as a separate order to Order Orchestration. Creating separate orders in Order Orchestration can prevent confusion about order status if, for example, a single order line is canceled or fulfilled. See the [Create Separate Picks for Ship for Pickup Orders \(L89\)](#) system control value for more information.

What if Order Orchestration is unavailable? If Order Orchestration does not respond to the submit order request during pick slip or drop ship purchase order generation, Order Administration does not print the pick slip or purchase order. Instead, it writes an order transaction history message: `Submit Order Failed - OROB Unavailable`. The order is eligible for selection the next time you generate pick slips or drop ship purchase orders.

Creating the Order Orchestration record: When the job generates the Submit Order request, it initially creates the Order Orchestration record in In Process status.

Message response: The Submit Order response message indicates whether Order Orchestration was able to create the order:

- *Order rejected?* If Order Orchestration returns an error in the response message, Order Administration puts the order on hold using the [Hold Reason for Errored Ship for Pickup Orders \(L10\)](#). Order Orchestration might return an error if, for example, the order includes an item that does not exist in Order Orchestration or in the point-of-sale system associated with the store location. In this case, the Order Orchestration record in Order Administration is deleted and Order Transaction History indicates:

```
Submit Order Rejected/Order Held
```

```
Rsn:PRODUCT NOT STOCKED IN REQUESTED LOCATION.
```

- *Order accepted?* If Order Orchestration accepts the order, the generation process sends a status update indicating a status of Picked. The process finishes and the Order Orchestration record remains in Picking status until you confirm shipment of the pick slip or purchase order.



Note:

The designated store location cannot reject a ship-for-pickup order.

Sample message: See Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for a sample message and more information.

Fulfilling location in Order Administration vs. Order Orchestration:

- **When order submitted to Order Orchestration:**
 - originating / placed location = the OACS warehouse shipping the merchandise to the store location.
 - fulfilling / sourced location = the OACS warehouse shipping the merchandise to the store location.
 - pickup location = the store location the customer selected for store pickup.
- **When store receives the merchandise or customer picks up the order:** Once Order Administration receives a status inquiry response indicating that the store location has received the merchandise on the order, or that the customer has picked the order up, the store location is identified as the fulfilling location.

- originating / placed location = the OACS warehouse shipping the merchandise to the store location.
- fulfilling / sourced location = the OACS warehouse shipping the merchandise to the store location.
- pickup location = the store location the customer selected for store pickup.

Excluded from brokered backorder processing: If the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to NEVER, backordered items on ship-for-pickup orders are not eligible for processing through the brokered backorder integration with Order Orchestration.

Creating ship-for-pickup orders for drop ship items: When you create a ship-for-pickup order for a drop ship item, Order Administration submits the order to Order Orchestration when you use [Selecting Vendors for Drop Ship Processing \(MDSP\)](#).

**Note:**

There is no warehouse associated with a drop ship item, so in this case Order Administration designates the [OROB Default Location \(K51\)](#) as the requesting location. If you are generating ship-for-pickup orders for drop ship items, you need to specify a valid Order Orchestration location in this system control value; otherwise, Order Orchestration returns an error indicating that the requesting location is invalid.

Documents for store receiving: In order to support store receiving, you can generate the *Pick Message from Order Administration (CWPickOut)* or the *PO Download XML Message (CWPurchaseOrderOut)*. Each of these messages includes details on the order submitted to Order Orchestration, including the Order Orchestration request ID, the order number in the originating system, and the delivery type. See the *Generic Pick Out API* and the *Generic Outbound Purchase Order API* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for more information.

Special Ship-for-Pickup Orders

In order to support processing special ship-for-pickup orders that originated in a retail location and then sent to Order Administration through the order API:

- If the order type matches the [Order Type for Special Orders \(L15\)](#), the Submit Order message specifies the e-commerce order number, rather than the Order Administration order number, as the `order_id`, so that the originating location can more easily identify and track the order.
- If the pay type matches the [Pay Type for Special Orders \(L16\)](#), the `balance_due` specified in the Submit Order message is the order total, indicating that the customer needs to pay for the order when picking it up. Otherwise, if the pay type on the order does not match this system control value, the Submit Order message does not specify a balance due, even if the order type matches the Order Type for Special Orders (L15).

See the Order Type for Special Orders (L15) and Pay Type for Special Orders (L16) system control values for more information.

If you use the *Generic Pick In API (Shipments, Voids, and Backorders)* to void a pick slip for a special ship-for-pickup order and the [Cancel Reason \(Pick In\) \(L86\)](#) system control value specifies a cancel reason code, or a backorder cancel reason is specified in the *CWPickIn XML Message*, Order Administration cancels the order using the specified cancel reason and sends a status update to Order Orchestration canceling the order.

 Important:

To prevent inconsistent updates to Order Orchestration for special ship-for-pickup orders, do not process partial backorders for these orders through the *Generic Pick In API (Shipments, Voids, and Backorders)*; confirm or void the entire pick slip. For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

Collect Payment for a Ship-for-Pickup Order at the Store?

You can use the [Payment at POS for Ship for Pickup Orders \(L60\)](#) system control value to indicate that the customer pays for a ship-for-pickup order when picking up the order at the store, rather than billing the order when you ship it to the store from the warehouse. In this case:

- The order must include only credit card payment methods; also, each pay type's *Card type* must be set to Credit. No other card types, such as stored value cards, can be included.
- The payment method's *Suppress deposit* and *Suppress refund* flags are set to Y.
- The payment method is authorized for \$1.00 only during online authorization.
- Authorization is suppressed during pick slip generation.
- Order Administration sends the order total to Order Orchestration as the `balance_due` in the Submit Order message.

 Note:

The above restrictions do not apply to ship-for-pickup orders whose order type matches the Order Type for Special Orders (L15).

Returns suppressed: Selecting the Payment at POS for Ship for Pickup Orders (L60) system control value suppresses most options for creating a return authorization, processing a return, and creating a refund. See that system control value for details.

Updates to a Ship-for-Pickup Order in Order Administration

Add an item? If you add an item to a ship-for-pickup order, or are able to ship a backordered item once you have generated the pick slip and created the ship-for-pickup order in Order Orchestration, the new item is not added to the original Order Orchestration record or to the order in Order Orchestration. Printing the pick slip for the new order line creates a new Order Orchestration record and a new order in Order Orchestration.

Voiding or reprinting a pick slip: Order Administration sends a status update to Order Orchestration if you void a pick slip for an order line on an existing ship-for-pickup order:

- **Special ship-for-pickup orders:** If the Cancel Reason (Pick In) (L86) system control value specifies a cancel reason or if a backorder cancellation reason code is specified in the *CWPickIn XML Message*, and you void the pick slip for a special ship-for-pickup order through the generic pick in API, Order Administration cancels the order or line and sends a cancellation to Order Orchestration, including the cancel reason from the system control value. For more information see the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1). Also see [Special Ship-for-Pickup Orders](#) for background on these orders.

- Regular ship-for-pickup orders: If the Create Separate Picks for Ship for Pickup Orders (L89) system control value is selected and you void the pick slip for a regular (not special) ship-for-pickup order, Order Administration does not cancel the order or line, but it does send a cancellation to Order Orchestration. No cancel reason is included in this case. This status update occurs regardless of whether you use the generic pick in API to void the pick slip, or void it at an Order Administration screen.

If you then reprint the pick slip for a regular ship-for-pickup order in this situation, Order Administration submits a new order to Order Orchestration; however, if you cancel the order after voiding the pick slip, no update is sent to Order Orchestration.

Aside from the two scenarios described above, Order Administration does not send a status update to Order Orchestration when you void or reprint a pick slip.

Canceling a ship-for-pickup order: Aside from the two scenarios, described above, which generate status updates for voided pick slips, Order Administration sends a status update to Order Orchestration when you cancel the order or item. In most cases, this status update includes the cancel reason you enter:

- Cancel after voiding pick slip: If you cancel an item or the entire ship-for-pickup order in order maintenance after voiding the pick slip, and Order Administration has not already sent a status update when the pick slip was voided, it sends a status update that includes the cancel reason you enter. This situation can occur if, for example, you void a ship-for-pickup order through the Void/Reprint Picks menu option, or if you void a regular ship-for-pickup order with the Create Separate Picks for Ship for Pickup Orders (L89) system control value unselected.
- Cancel drop ship purchase order in purchase order maintenance: If you cancel a drop ship purchase order in purchase order maintenance, Order Administration sends a status update that includes the [Auto Soldout Cancel Reason \(C20\)](#), since you do not have an opportunity to enter a cancel reason in this case.
- Cancel drop ship purchase order sent to vendor through drop ship integration: To cancel items fulfilled through the drop ship integration, you need to use the [Display P/O Drop Ship Screen](#) in order inquiry. If you cancel a drop ship purchase order at this screen, and the purchase order is successfully canceled through the drop ship integration, it sends a status update that includes the cancel reason you enter.

 Note:

- Canceling single item cancels entire order in Order Orchestration: If you do not split orders and the pick slip creating the order in Order Orchestration included multiple items, canceling a single item in Order Administration results in canceling the entire order in Order Orchestration. This situation might occur if the Create Separate Picks for Ship for Pickup Orders (L89) system control value is not selected.
- Canceling before order created in Order Orchestration: If you cancel the order before pick slip generation or drop ship purchase order generation, there is no need to notify Order Orchestration, since the order was never sent.
- Cancel after shipment confirmation? Once you have confirmed shipment, it is not possible to cancel the ship-for-pickup order in Order Orchestration.

Ship-for-Pickup Order Processing on or after Shipment

Confirm shipment: When you confirm shipment of the pick slip, Order Administration changes the status of the Order Orchestration record and sends a status update to Order Orchestration with a status of Intransit, indicating that the order is on its way.

Additional processing:

- When the assigned location sends a fulfillments request message to Order Orchestration to poll for newly assigned orders, it receives notification of the ship-for-pickup order.

 Note:

The location assigned to a ship-for-pickup order cannot reject the order.

- The assigned store location sends the following additional status updates:
 - Received when the merchandise arrives at the store
 - Fulfilled (Order Administration status = Completed) when the customer picks up the order, or Partially fulfilled if the customer does not initially pick up the entire order

 Note:

When Order Administration receives a status list inquiry response from Order Orchestration indicating that the merchandise was received at the store or that the customer has picked up the order, the fulfilling location on the Order Orchestration record in Order Administration changes from the warehouse shipping the order to the store location where the customer picks up the order.

How Order Administration checks for additional status updates: Once you confirm shipment of the ship-for-pickup order to the store location, Order Administration includes the order in a status list inquiry request message once a day to Order Orchestration to check on whether the order has been received or picked up. See [Setting the Daily Status Inquiry Time Window \(all versions\)](#) for more information.

Returning a ship-for-pickup order: Selecting the [Payment at POS for Ship for Pickup Orders \(L60\)](#) system control value suppresses most options for creating a return authorization, processing a return, and creating a refund. See that system control value for details.

Reviewing a Ship-for-Pickup Order in Order Inquiry

In addition to reviewing information through the Working with Order Broker (WOBR) menu option, you can also use order inquiry. Your options include:

- Identifying the Order Orchestration type: The *Broker delivery type* at the [Display Order Properties Screen](#) and the [Display Order Broker Details Screen](#) identifies a Ship for Pickup order.
- Broker detail and history: Use the [Display Order Broker Details Screen](#) to review Order Orchestration Detail and Order Orchestration History.
- Designated store: The [Display Alternate Address Screen](#) displays the store shipping address. You can advance to this screen by selecting the Ship To option from the header screen in order inquiry.
- Order history: The [Display Order History Screen](#) displays activity related to sending status updates to and from Order Orchestration, such as:

- **Ln#: 1 Selected for Fulfillment:** Written for each line on a ship-for-pickup order printed on a pick slip and sent to Order Orchestration in the Submit Order Message.
- **Ln#: 1 In Transit shipment:** Written for each printed line when you confirm shipment.
- **Ln#: 1 Accepted by Broker:** Written when you receive the status inquiry request indicating that the location where the customer is picking up the ship-for-pickup order has been notified.
- **Ln#: 1 Cancel Acknowledged by Broker:** Written when you receive the status update response message following the cancellation of a ship-for-pickup order. This situation occurs if you void the pick slip after initially notifying Order Orchestration about the order.
- **Ln#: 1 Store Received:** Written when you receive the status inquiry response message indicating that the order merchandise has been received at the store where the customer will pick up the order. At this point, the fulfilling location on the Order Orchestration record in Order Administration changes from the warehouse shipping the merchandise to the store location where the customer picks up the order.
- **Ln#: 1 Customer Partial Pick Up:** Written when you receive the status inquiry response message indicating that the customer has picked up some, but not all, of the merchandise on the order.
- **Ln#: 1 Shipped by Broker order:** Written when you receive a status inquiry response message indicating that the customer has picked up the order in full.

If Order Orchestration returns an error: If Order Orchestration returns an error during pick slip generation, Order Administration writes Order Transaction History messages such as:

```
Submit Order Rejected/Order Held
Rsn:INVALID ITEM (SYSTEM PRODUCT), ITEM
(PEN BLUE ) DOES NOT
EXIST. PRODUCT NOT STOCKED IN REQUESTING LOCATION
```

If the error occurs as a result of Selecting Vendors for Drop Ship Processing (MDSP), the messages might also indicate that the pick slip or purchase order was created, for example:

```
DROP SHIP PO# 1234567 CREATED.
```

However, in this situation the process does not produce the pick slip or purchase order.

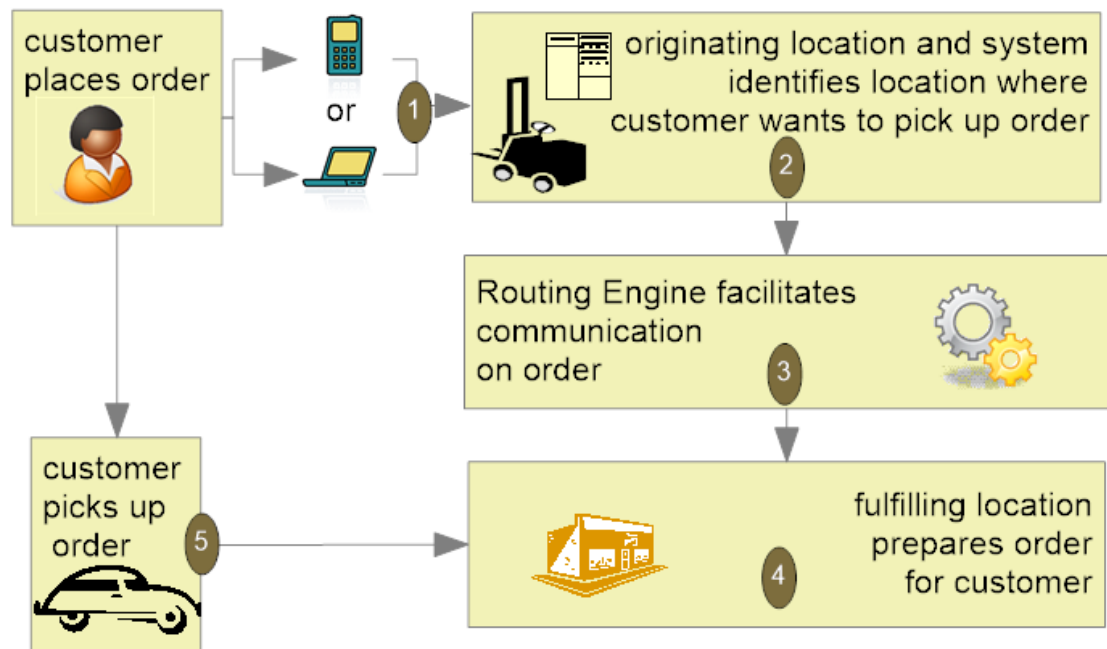
If you submit a drop ship order and the [OROB Default Location \(K51\)](#) system control value does not specify a valid location in Order Orchestration, Order Orchestration returns an error during drop ship processing. In this case, Order Administration writes Order Transaction History messages such as:

```
Submit Order Rejected/Order Held
Rsn:INVALID OR MISSING REQUESTING LOCATION
ON LOCATION CODE, (STORE_LOCATION.LOCATION_CD) IS REQUIRED.
```

Store Pickup Orders

Overview: You can create a store pickup order if the customer prefers to pick up an order from a retail location where the inventory is already available rather than waiting for a shipment from

the warehouse. Unlike ship-for-pickup orders, store pickup orders do not require you to transfer the inventory from a warehouse or other store location; instead, the customer selects a location that already has the ordered quantity of all the items in stock.



In this topic:

- [Store Pickup Order Creation Overview](#)
- [Merchandise Locator Search Window \(Store Pickup\)](#)
- [Store Pickup Search Results Screen](#)
- [Status Inquiry and Updates after Creation](#)
- [Notifying the Customer that the Store Pickup Order is Ready](#)
- [Store Pickup Order Fulfillment](#)
- [Creating a Store Pickup Order through the Order API](#)
- [Reviewing a Store Pickup Order in Order Inquiry](#)
- [Canceling a Store Pickup Order](#)
- [Troubleshooting Creation of Store Pickup Orders and Things to Note](#)

Store Pickup Order Creation Overview

Store Pickup option: You can create a store pickup order by selecting the Store Pickup option at the [Work with Order Lines Screen \(Adding Items to the Order\)](#) after entering the items on the order. The Store Pickup option is available only if the [Use Merchandise Locator \(I38\)](#) system control value is selected and the [Store Pickup Order Type \(L33\)](#) system control value specifies an order type. Also, this option is available in order entry only, not in order maintenance.

Requirements: You cannot select the Store Pickup option if the order includes any items that:

- are not flagged **OROB eligible**

- are flagged for special handling or have the *Gift wrap* flag selected
- are held
- are sold out

Also, the order must:

- not include more than one ship-to
- not be a ship-for-pickup order

What if the order is held? Order Administration submits a store pickup order to Order Orchestration regardless of whether the order is held; however, if the order is held and the [Payment at POS for Store Pickup \(M16\)](#) system control value is unselected, Order Administration submits the order to Order Orchestration with the *Under Review* flag selected. This setting indicates that the order should not be picked up until the *Under Review* flag is cleared, because Order Administration needs to be able to collect payment, but enables the store associates with the opportunity to reserve the inventory and prepare the order in the meantime. When the order is released from hold, Order Administration sends the order status update message, indicating to clear the *Under Review* flag.

See the [Payment at POS for Store Pickup \(M16\)](#) system control value for a discussion.

Searching for locations: When you select the Store Pickup option on a qualifying order, you advance to the [Merchandise Locator Search Window \(Store Pickup\)](#) so that you can find a store location near the customer's location where the items are available. Optionally, you can specify a different location or change the search radius. See the [Merchandise Locator Search Window \(Store Pickup\)](#) for more information.



Note:

The Order Orchestration Routing Engine supports merchandise locator searches only in the U.S. and Canada.

LocatelItems request and response messages: Order Administration sends the LocatelItems request message to Order Orchestration. This message specifies the items on the order, the customer's location, and the search radius.

Selecting a location: After you complete the [Merchandise Locator Search Window \(Store Pickup\)](#), you advance to the [Store Pickup Search Results Screen](#). This screen lists locations that:

- were included in the LocatelItems response message, indicating that the location is flagged as *Pickup available* in Order Orchestration, it stocks the item(s) on the order, and
- have records in the Store Cross Reference table, set up through the [Work with Store Cross Reference \(WSCR\)](#) option.

See the [Store Pickup Search Results Screen](#) for more information.

When you select a location at this screen, Order Administration:

- flags all Order Detail lines with a *Pickup type* of SP
- updates the *Pickup location ID* and *Location system ID* with the selected location code and the [System Code](#), if any, from the Store Cross Reference record; otherwise, from the [Name in OROB for Point of Sale \(L09\)](#).
- sets the *Delivery type* field in the Order Ship To table to P

Requirements to accept the order: When you accept the order, Order Administration verifies that:

- the order has a credit card payment method, and no other pay types
- all lines on the order are flagged for store pickup and do not include any special handling or gift wrap charges

**Note:**

If you have changed the quantity on an order line or added any new items to the order, you need to select the Store Pickup option again before you accept the order.

Also, the customer must have:

- an email address, and
- the opt-in/out flag for the email address set to O1 (all emails) or O2 (order-related emails).

The email address and opt-in/out setting are required so that Order Administration or Order Orchestration can notify the customer by email when the order is ready for pickup at the designated store location. See [Store Pickup Notifications](#) for more information on a notification you can have Order Administration generate; however, the Store Connect module uses a notification email generated by Order Orchestration. See the Order Orchestration online help for more information.

Updates at accept: At acceptance, Order Administration performs additional updates to order-related tables:

- *Order Detail:*
 - *Drop ship* flag set to D
 - *Printed quantity* set to the ordered quantity
 - *Reserved quantity*, *Backorder quantity*, and *Backorder warehouse* set to zero
- *Order Ship To:*
 - *Freight and Freight balance*, if any, set to zero and the *Calculate freight* flag set to N if the [Calculate Freight for Store Pickup Orders \(L32\)](#) system control value is unselected
- *Order Header:* *Order type* set to the [Store Pickup Order Type \(L33\)](#). If the Store Pickup Order Type (L33) is not flagged for online authorization, this change prevents Order Administration from sending the payment method out for authorization
- *Order Ship To Address:* creates a record using the information set up through the Work with Store Cross Reference (WSCR) option; however, if you entered a name or apartment/suite, or selected a permanent ship-to number, this information is retained
- *Order Payment Method:* If the Payment at POS for Store Pickup (M16) is:
 - selected:
 - * the payment method is authorized for \$1.00
 - * the *Suppress deposit* flag set to Y, so that the deposit is not processed in Order Administration when the order is billed
 - * the `balance_due` specified in the SubmitOrder message is equal to the order total
 - unselected:
 - * the payment method is authorized for the full amount

- * the *Suppress deposit* flag is set to N, so that the deposit is processed in Order Administration when the order is billed
- * the `balance_due` specified in the SubmitOrder message is zero

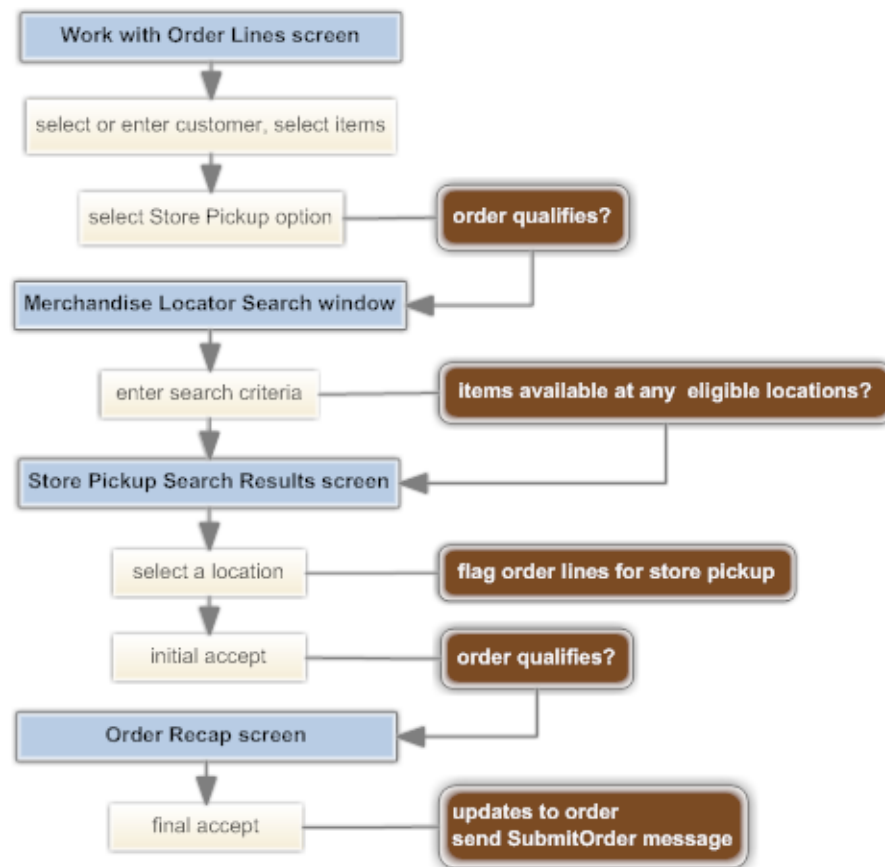
Sending the SubmitOrder request to Order Orchestration: When you accept a store pickup order, Order Administration sends a SubmitOrder request to Order Orchestration. See the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for more information.

When Order Administration receives the SubmitOrder response message from Order Orchestration, it sets the Order Orchestration record in Acknowledged status and writes an Order Transaction History message on the order: `Submit Order Succeeded`. This message indicates that the order was created successfully in Order Orchestration, not that the selected location has already accepted the order. The system also updates the line number(s) in the Order Orchestration and Order Orchestration History records.

What if the order is held? Order Administration submits a store pickup order to Order Orchestration regardless of whether the order is held; however, if the order is held and the Payment at POS for Store Pickup (M16) system control value is unselected, Order Administration submits the order to Order Orchestration with the *Under Review* flag selected. This setting indicates that the order should not be picked up until the *Under Review* flag is cleared, because Order Administration needs to be able to collect payment, but enables the store associates with the opportunity to reserve the inventory and prepare the order in the meantime.

If the order is not held, or if the Payment at POS for Store Pickup (M16) system control value is selected, Order Administration does not select the *Under Review* flag when submitting the order, so the order is eligible for pickup.

When a store pickup order is released from hold, Order Administration sends an update to Order Orchestration indicating to clear the *Under Review* flag. See the Order Update Request sample in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for more information.



Merchandise Locator Search Window (Store Pickup)

Purpose: Use this window to enter the search criteria when selecting a store location where the customer can pick up all the items on the order. See [Store Pickup Orders](#) for background.

How to display this screen: Select Store Pickup at the [Work with Order Lines Screen \(Adding Items to the Order\)](#) after entering the items on the order. The Store Pickup option is available only if:

- the Use Merchandise Locator (I38) system control value is selected and the Store Pickup Order Type (L33) system control value specifies an order type
- you are in order entry, and not order maintenance
- you are entering the first and only ship-to on the order

You cannot select the Store Pickup option if the order includes any items that:

- are not flagged [OROB eligible](#)
- have special handling instructions or have the *Gift wrap* flag selected
- are held (however, if the order itself is held after acceptance, Order Administration still submits it to Order Orchestration for fulfillment)

Also, the order must:

- include at least one item that is not sold out
- not be a ship-for-pickup order

**Note:**

This window is very similar to the [Merchandise Locator Search Window \(Searching for an Item\)](#) you use for informational merchandise locator searches for a single item. See [Merchandise Locator API](#) for background on merchandise locator searches.

**Important:**

Order Broker and Order Orchestration support merchandise locator searches only within the U.S. and Canada.

Field	Description
	NOTE - The information at this window defaults from the sold-to customer address, or the last entered information if you are repeating a search for the same customer. - The search radius you enter applies only to locations that use proximity rules.
Postal code	The customer's U.S. zip or Canadian postal code, to serve as the central point for the search radius. For example, if the <i>Search within</i> field is set to 25 miles, the search includes stores within 25 miles of this postal code. NOTE: Your entry in this field is not validated against the Zip/City/State table. <i>Alphanumeric, 10 positions; required if you do not enter a city and state.</i>
Address	The customer's street address, to serve as the central point for the search radius. <i>Alphanumeric, 32 positions; optional.</i>
City	The customer's city, to serve as the central point for the search radius. <i>Alphanumeric, 25 positions; required if you do not enter a postal code.</i>
State	The customer's U.S. state or Canadian province, to identify the location of the city. <i>Alphanumeric, 2 positions; required if you do not enter a postal code.</i>
Country	The customer's country. The country defaults from the customer address if you advanced to this window from order entry or order maintenance; otherwise, it defaults from the Default Country for Customer Address (B17) system control value. Defined in and validated against the Country table; see Setting Up the Country Table (WCTY) for more information. <i>Alphanumeric, 2 positions; required.</i>

Field	Description
Search within	Indicates the search radius, in miles or kilometers, to search within for the selected item. The search radius defaults from the Default Search Within Radius (I40) system control value, but you can override it. NOTE: The distance unit of measure (miles or kilometers) specified with the Merchandise Locator Distance Measurement (I39) system control value is to the right. <i>Numeric, 5 positions; required.</i>

Completing this window:

- Optionally, override the postal code or the city and state to serve as the central point for the search radius.
- Optionally, override the *Search within* radius to a different distance.
- Click OK. Order Administration generates the LocateItems request message. When it receives the LocateItems response message, you advance to the [Store Pickup Search Results Screen](#).

Troubleshooting: If you cannot display this window, or if the screen displays an error message after you attempt to search, see [Troubleshooting Creation of Store Pickup Orders and Things to Note](#) for help.

Store Pickup Search Results Screen

Purpose: Use this screen to select a store location for the customer to pick up all the items on the order.

Which locations listed? This screen lists locations that:

- Have records set up through the Work with Store Cross Reference (WSCR) option, and
- Were returned in the LocateItems response message from Order Orchestration, indicating that:
 - They are within the search radius specified at the [Merchandise Locator Search Window \(Store Pickup\)](#)
 - Have the requested quantity of all items on the order in stock
 - Are flagged in Order Orchestration as *Pickup available*
 - Were not eliminated from the search results due to probability rules in Order Orchestration
 - Were not eliminated from the search results because the number of eligible locations exceeded the *Maximum No. Responses* specified in Order Orchestration.

**Note:**

A distance of zero indicates that the location is not flagged to *Use proximity locator* in Order Orchestration. In this case, the location is always eligible to be included in the search results if it is also flagged as *Pickup available*, if it has the requested quantity of the items on the order, and if there is a Store Cross Reference record set up in Order Administration.

Troubleshooting:

- Only store locations that have Store Cross Reference records are eligible for display at this screen. See [Work with Store Cross Reference \(WSCR\)](#) for background.
- See [Troubleshooting Creation of Store Pickup Orders and Things to Note](#) for possible error messages.

Updates when you select a store location: When you select a location, Order Administration updates all Order Detail records:

- Sets the *Pickup type* for each item to SP
- Updates the *Pickup location ID* with the code of the selected location
- Updates the *Location system ID* with the System Code, if any, from the Store Cross Reference record; otherwise, from the Name in OROB for Point of Sale (L09)

For more information: See [Store Pickup Orders](#) for an overview, including details on information required before you can accept a store pickup order.

How to display this screen: Complete the [Merchandise Locator Search Window \(Store Pickup\)](#).



Note:

Although the information at this screen is from the location record in Order Orchestration, when you accept a store pickup order Order Administration uses the Store Cross Reference record to create the Order Ship To Address for the order.

Field	Description
Store	Select the store location where the customer would like to pick up the order. The store information consists of: Store code The code identifying the store location in Order Orchestration and in the Store Cross Reference table. <i>Alphanumeric, 10 positions.</i> Store name The name of the store location from Order Orchestration. If the name exceeds 35 positions, it is truncated. <i>Alphanumeric, 35 positions.</i> Street The street address of the store location from Order Orchestration. If the street address exceeds 40 positions, it is truncated. <i>Alphanumeric, 40 positions.</i> City The city of the store location from Order Orchestration. If the city name exceeds 35 positions, it is truncated. <i>Alphanumeric, 35 positions.</i> State The state of the store location from Order Orchestration. <i>Alphanumeric, 2 positions.</i> Postal code The postal code of the store location from Order Orchestration. <i>Alphanumeric, 10 positions.</i> Country The country of the store location from Order Orchestration. <i>Alphanumeric, 3 positions.</i> Phone number The phone number of the store location from Order Orchestration. If the phone number exceeds 14 positions it is truncated. <i>Alphanumeric, 14 positions.</i>

Field	Description
Distance	The number of miles or kilometers, based on the Merchandise Locator Distance Measurement (I39), from the search location. This distance might be approximate, depending on the actual criteria used to search (for example, postal code or city), and does not represent an actual driving distance. No distance is displayed if the location is not set up in Order Orchestration to use proximity rules. In this situation, the location is always considered to be within the specified search radius. Also, no distance is displayed if the store location and the search location are in the same zip or postal code. The distance is rounded down when determining whether to include the location in the search results. For example, if the Search radius is 10 miles, and the location is 10.84 miles away, the location is included in the results. The distance is shown if the location is shown. The location is shown when: • Pickup qty > 0 and store flagged as pickup even though not ship for pickup • Pick qty = 0, store not flagged as pickup available but store is flagged for ship for pickup Location is not shown if no inventory and not flagged as ship for pickup. <i>Numeric, 7 positions with a 2-place decimal.</i>

Status Inquiry and Updates after Creation

Overview: Once Order Administration submits the order to Order Orchestration, it begins including the order in periodic status inquiry list requests to determine when:

- the selected store location polls Order Orchestration for new orders and is notified about the order
- the location accepts or rejects the order
- the customer picks up the order, either partially or completely
- potentially, the customer cancels the order at the store location

How often? The BROKER process in [Working with Integration Layer Processes \(IJCT\)](#) sends periodic status inquiry list request messages to Order Orchestration for store pickup orders:

- If the current status of the Order Orchestration record in Order Administration is Acknowledged, Polled, or Accepted, the process uses the [Order Broker Status Update Interval \(K10\)](#) to determine how often to request an update.
- If the current status is Partially Fulfilled, the process sends the message once a day. See [Setting the Daily Status Inquiry Time Window \(all versions\)](#) for background.

Updates based on status inquiry responses: Order Administration initially creates the Order Orchestration record in Acknowledged status, indicating that Order Orchestration has received notification of the order and assigned it a request ID. The following table summarizes the updates that take place in Order Administration based on the current status indicated in the response message from Order Orchestration.

Status in Update Response from OACS	Status of Order Orchestration record in OACS	Additional Updates
Polled	Polled	None
Accepted	Accepted	None
Picked	Accepted	None
Partial Fulfill	Partially Fulfilled	None
Fulfilled	Completed	See Store Pickup Order Fulfillment .
Unfulfillable	Rejected	Order Administration cancels the order using the Cancel Reason (Rejected Store Pickup Orders) (G11) and writes Order Transaction History messages such as the following: Order was maintained Web cancel request processed. Ln#: 1 Rejected by Store Ln#: 2 Rejected by Store An Order Transaction History message such as the above is written for each line on the order.
Canceled	Canceled	See Canceling a Store Pickup Order .

**Note:**

If the status in Order Orchestration is Verified or Processed, Order Administration does not update the status of the Order Orchestration record.

Sample messages: See the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1).

Other ways to update store pickup orders? After you create a store pickup order, maintenance to the order is prohibited. The only possible update you can make within Order Administration is to cancel the order; see [Canceling a Store Pickup Order](#).

Notifying the Customer that the Store Pickup Order is Ready

If the order is assigned to a Store Connect location, you can configure Order Orchestration to generate its own pickup notification email. See the Order Orchestration Web Services Guide on <https://support.oracle.com> (ID 2953017.1) or the Order Orchestration online help for more information.

Your point-of-sale system can use the CWEmailRequest message to request that Order Administration generate Store Pickup Notifications. The notification indicates that the customer's order is ready for pickup in the designated store location.

See [Store Pickup Confirmation Email Program \(L48\)](#) and the [Store Pickup Notification Sample and Contents](#) for more information.

**Note:**

This program is not used for Store Connect. If the order is assigned to a Store Connect location, you can configure Order Orchestration to generate its own pickup notification email. See the Order Orchestration *Web Services Guide* on <https://support.oracle.com> (ID 2953017.1) or the Order Orchestration online help for more information.

Store Pickup Order Fulfillment

When Order Administration receives a status list response message from Order Orchestration indicating that a store pickup order is in Fulfilled status, it:

- Changes the status of the Order Orchestration record to Completed (X).
- Submits the order to the BILL_ASYNC job.
- Clears the *Drop ship* flag on the order details.
- Deactivates the payment method(s).
- If the [Payment at POS for Store Pickup \(M16\)](#) is selected, sets the *Suppress deposit* flag for the order payment method to Y, so that the deposit is not processed in Order Administration when the order is billed; otherwise, the *Suppress deposit* flag is set to N, so that the deposit is processed in Order Administration.
- Clears the hold reason(s), if any, on the order.
- Writes Order Transaction History messages such as:

Ln#1: Shipped by Broker

CC DEPOSIT BYPASSED ON INVOICE # 1234567

Pick# 0000000 Billed on Invoice# 1234567

For more information: See [Fulfillment Process: After Order Creation and Status Updates](#) for details on additional updates at fulfillment, including invoice creation.

Creating a Store Pickup Order through the Order API

Overview: You can create a store pickup through the order API by specifying:

- a `delivery_type` of P
- the `store_code` identifying the store location where the customer would like to pick up the order

Other requirements: Creating a store pickup order through the order API is subject to the same requirements described under [Store Pickup Orders](#).

Freight calculation: The [Calculate Freight for Store Pickup Orders \(L32\)](#) system control value does not apply to the order API. To prevent freight from applying to a store pickup order, the CWOOrderIn message can include the `calc_frt` attribute set to N; otherwise, normal freight calculation applies.

Ship-to address: As in interactive order entry, the order API uses the Store Cross Reference record to create the Order Ship To Address for the order. If the CWOOrderIn message included any ship-to name and address information, only the name and apartment/suite number (and permanent ship-to number, if any) are retained on the order.

**Note:**

The order API does not prevent the creation of multiple shipping addresses for a store pickup order; however, you should avoid submitting such orders through the order API to prevent errors in order processing.

CWORDEROUT message: If the `response_type` in the `CWOrderIn` message indicates to return a detailed response, the `CWORDEROUT` response message includes the following information related to a store pickup order:

- **ShipTo element:**
 - `delivery_type` is Store Pickup
 - ship-to name and address is from the Store Cross Reference record for the selected store location
- **Detail element:**
 - `pickup_type` is SP
 - `pickup_system_location` is from the System Code, if any, for the Store Cross Reference record; otherwise, from the [Name in OROB for Point of Sale \(L09\)](#)
 - `pickup_location` is the selected location's store code from Order Orchestration and the Store Cross Reference record
 - `broker_status` is Acknowledged if the `SubmitOrder` message was successfully processed by Order Orchestration; otherwise, the `broker_status` is not included

Errors: In addition to the normal edits that take place in the order API, the following errors can apply to store pickup orders:

- **HDR errors:**
 - Invalid Store Code = The `store_code` is invalid, or no `store_code` was specified. If the message specified an invalid store code that is not in the Store Cross Reference table, additional errors related to the ship-to address are included (such as Invalid Ship To Address, State Blank, City Blank, and so on)
 - Invalid Delivery Type = the `delivery_type` was not P (store pickup) or S (ship-for-pickup)
 - Email Missing/Ineligible = The customer does not have an email address, or the customer's opt-in/out setting is not O1 (all emails) or O2 (order-related emails). The email address and opt-in/out setting are required so that Order Administration can generate the store pickup notification email when the order is ready for pickup at the designated store location. See Store Pickup Notifications for more information.
- **DTLS errors:**
 - Ineligible for Store Pick = The order does not meet the requirements for a store pickup order, such as an invalid pay type; see [Store Pickup Order Creation Overview](#)
 - Store Fulfillment Loc Msg = Included if there is no `store_code` specified
 - Store Fulfillment Subscription = Included if the order included a subscription item
 - Store Fulfillment Membership = Included if the order included a membership item

If there are any errors on the order, Order Administration does not submit it to Order Orchestration. You can use batch order entry to correct the errors and submit the order for store pickup.

Order type change: The order type does not change to the [Store Pickup Order Type \(L33\)](#) until after the order is submitted for online authorization.

For more information: See:

- [Generic Order Interface \(Order API\)](#)
- [Order Creation Errors](#)

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

Reviewing a Store Pickup Order in Order Inquiry

Identifying a store pickup order in order inquiry: The following information identifies a store pickup order in order inquiry:

- Order properties: The *Delivery type* at the [Display Order Properties Screen](#) and the [Display Order Broker Details Screen](#) is Store Pickup.
- Order detail: The line is flagged with a status of SPU at the [Order Inquiry Detail Screen](#), and the *Printed quantity* is the same as the ordered quantity. You can select D/S Status for a single line at the [Order Inquiry Detail Screen](#) to advance to the [Display Order Broker Details Screen](#), where you can review details and history for the order line.
- Order type: The order *Type* on the [Order Inquiry Header Screen](#) matches the [Order Type for Retail Pickup Orders Brokered to OROMS \(K92\)](#).
- Order ship to address: The ship-to name and address at the [Display Alternate Address Screen](#) defaults from the Store Cross Reference record for the selected store location.
- Broker detail and history: Use the [Display Order Broker Details Screen](#) to review Order Broker Detail and Order Broker History.

Reviewing Order Transaction History messages: The following table provides sample Order Transaction History messages and their explanations. You can review these messages at the [Display Order History Screen](#).

Order Transaction History Message(s)	Explanation
Submit Order Failed - OROB Unavailable	Communication with Order Orchestration is not available, or the Order Orchestration application is not active. Order Administration saves the information about the order in the Store Pickup tables, and attempts to submit the order to Order Orchestration the next time you start the BROKER_ORD process.
Submit Order Succeeded	Order Administration submitted the order to Order Orchestration.
Ln#: 1 Acknowledged by Broker	Order Orchestration created the order and responded with the request ID. NOTE: A similar message is included for each line on the order.
Ln#: 1 Accepted by Broker	Order Orchestration responded to a status inquiry and indicated that the selected location has accepted the order. NOTE: A similar message is included for each line on the order.

Order Transaction History Message(s)	Explanation
Store Pickup conf to flast@example.com	Order Administration generated the store pickup notification email to the customer, indicating that the order is ready for pickup at the designated store location. The email address may be truncated if the entire message exceeds 30 positions. See Store Pickup Notifications for more information.
Could not send Store Pickup Email	Order Administration could not generate the store pickup notification. Possible reasons are: - no email address on the order (NOTE: The email address is stored in the Order Header Extended table, but is not displayed on any screen.) - the opt-in/out setting is not O1 or O2 for the email address on the order If Order Administration could not generate the store pickup notification for any other reason (for example, if the order is closed or canceled), no Order Transaction History message is written. NOTE: This notification is not used by the Store Connect module. See Store Pickup Notifications for more information.
Ln#: 1 Customer Partial Pick Up	Order Orchestration responded to a status inquiry and indicated that the customer has picked up part of the order from the selected location. NOTE: A similar message is included for each line on the order. Order Orchestration does not indicate which line(s) have been picked up and which have not.
Ln#: 1 Shipped by Broker MANUAL AUTH# DETECTED - auth Pick# 0000000 Billed on Invoice# 1238008	Order Orchestration responded to a status inquiry and indicated that the customer has picked up the entire order from the selected location. NOTE: The first message line is included for each line on the order.
Order was maintained Web cancel request processed. Ln#: 1 Rejected by Store	Order Orchestration responded to a status inquiry and indicated that the selected location has rejected the order. In this situation, Order Administration cancels the order, using the Cancel Reason (Rejected Store Pickup Orders) (G11). NOTE: The last message line is included for each line on the order.
Submit Order Rejected/Order Not Canceled	Order Orchestration responded to a status inquiry and indicated that the selected location has rejected the order; however, the Cancel Reason (Rejected Store Pickup Orders) (G11) system control value is blank, so Order Administration could not cancel the order.
Order was maintained Web cancel request processed. Ln#: 1 Canceled by Store	Order Orchestration responded to a status inquiry and indicated that the order has been canceled at an external location, typically the location selected for pickup. In this situation, Order Administration cancels the order, using the Cancel Reason (Rejected Store Pickup Orders) (G11). NOTE: The last message line is included for each line on the order.

Order Transaction History Message(s)	Explanation
Order was maintained Ln#: 1 Cancel Acknowledged by Broker	You canceled the order in order maintenance, and the status update message was sent to and acknowledged by Order Orchestration. NOTE: The last message line is included for each line on the order.
Submit Order Rejected/Order Canceled Rsn:INVALID FULFILLING LOCATION CODE. LO CATION (10) DOES NOT EXIST FOR SYSTE M (SYSTEM01)	Order Orchestration was not able to create the order, because the selected location was not set up correctly in Order Orchestration. In this situation, Order Administration cancels the order, using the Cancel Reason (Rejected Store Pickup Orders) (G11).
Order was maintained Web cancel request processed. Submit Order Rejected/Order Canceled Rsn:Invalid or missing fulfillment system code system_cd) is required for a pickup request	Order Orchestration was not able to create the order, because the SubmitOrder request message from Order Administration to create the order did not specify a valid location associated with a valid system code in Order Orchestration. Check the System Code, if any, from the Store Cross Reference record, or the Name in OROB for Point of Sale (L09), and confirm that the code sent to Order Orchestration is a valid system code associated with the store location code.

You can also review information about the order through the [Working with Order Broker \(WOBR\)](#) option.

Canceling a Store Pickup Order

Canceling a store pickup order in order maintenance: You cannot maintain a store pickup order, although you can cancel it in order maintenance if you have authority under the [Cancel Order Broker Lines \(B19\)](#) secured feature:

- If you do not have authority under the secured feature, when you select a store pickup order for maintenance a pop-up window indicates: Not authorized to maintain brokered order.
- If you have authority under the secured feature, when you select a store pickup order for maintenance a pop-up window indicates: This is a Store Pickup order and can only be canceled!
 - If you click OK, you advance directly from this pop-up window to the Confirm Cancel window.
 - If you click OK at the Confirm Cancel window, you advance to the [Enter Cancel Reason Window](#).
 - If you complete the Enter Cancel Reason window, Order Administration cancels the order.

Hold reason(s) removed: When you cancel a store pickup order, Order Administration removes the hold reason(s), if any, on the order.

Notification to Order Orchestration: After you cancel a store pickup order, Order Administration changes the Order Orchestration record's status to Pending Cancel, and then to Canceled once the BROKER_ORD job has sent the status update message to Order Orchestration and received the response. The status update includes the cancel reason you entered at the Enter Cancel Reason window. When it processes the response, Order Administration writes Order Transaction History messages such as:

```
Order was maintained
```

```
Ln#: 1 Cancel Acknowledged by Broker
```

A line-specific message such as in the above sample is written for each line on the order.

See the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for a sample.

Notification timing: The BROKER_ORD process in Working with Integration Layer Processes (IJCT) uses its *Outbound delay time* to determine how often to “wake up” and start evaluating Order Orchestration records. If it finds orders in Pending Cancel status, it generates the status update immediately and does not wait for the entire Order Broker Status Update Interval (K10).

Example: The *Outbound delay time* for the BROKER_ORD process is 60 seconds. When you start the process, it sends status updates for any orders in Pending Cancel status, then evaluates whether to send any other request messages based on the Order Broker Status Update Interval (K10). Once it has evaluated all orders in all companies, it then waits 60 seconds before restarting the process of checking for orders in Pending Cancel status and evaluating whether to send inquiry request messages for orders in other statuses.

Order Administration does not verify the pickup order's current status in Order Orchestration before processing the cancellation.

**Note:**

Although the BROKER_ORD process generates the submit order requests (and cancellation requests, if needed), the BROKER process handles other requests to Order Orchestration.

Receiving a Store Pickup Cancellation from Order Orchestration

If the customer cancels the order, or an item on the order, at a retail location, Order Administration receives the cancel status update when it sends a periodic status inquiry list request and receives the response. In this situation, Order Administration cancels the order or item using the Cancel Reason (Rejected Store Pickup Orders) (G11); also, it writes Order Transaction History such as:

```
Order was maintained
```

```
Web cancel request processed.
```

```
Ln#: 1 Canceled by Store
```

A line-specific message such as in the above sample is written for each canceled line on the store pickup order.

**Note:**

- The Cancel Reason (Rejected Store Pickup Orders) (G11) system control value must specify a valid cancel reason in order to correctly cancel an order or item based on messages received from Order Orchestration.
- Canceling individual lines is supported only if the [Use Split Order \(L56\)](#) system control value is selected, and the corresponding preference is selected in Order Orchestration. See [Order Orchestration Configuration](#) and the Order Orchestration online help for background.

Troubleshooting Creation of Store Pickup Orders and Things to Note

Issue or Note	Explanation or Solution
Merchandise locator searching: errors	
One or more pickup item(s) is not eligible for Store Pickup	• Even though the item is flagged as <i>OROB eligible</i>, it is not a valid item in Order Orchestration. This situation could occur if, for example, you have not yet run Order Orchestration's Product, Product Location, and Incremental Inventory Import Process since creating the item or flagging it as <i>OROB eligible</i>; or, • There are no store locations within the search radius that have all the items on the order available in the requested quantities. Optionally, you can: • expand the search radius • use the Merchandise Locator option for individual order lines to determine the locations where each item is available, and the available quantities of each
Cannot identify customer location	The postal code or location specified at the search window were not found in the Order Orchestration proximity database.
Item XXXXXX is not eligible for store pickup	This item is not flagged as <i>OROB eligible</i> . If multiple items on the order are not flagged as <i>OROB eligible</i> , the error message lists just the first one on the order.
No Response or Web Service Failure	The Order Orchestration application is not active.
Merchandise locator searching: things to note	

Issue or Note	Explanation or Solution
The item is listed as available in a particular location in Order Orchestration, but the location is not included at the search results screen	Can occur if: • The number of locations where the item is available exceeds the <i>Maximum No. Responses</i> specified in Order Orchestration. • The location is not flagged as <i>Pickup available</i> in Order Orchestration. • there is no Store Cross Reference record set up in Order Administration through the Work with Store Cross Reference (WSCR) option.

**Note:**

The Merchandise Locator option for individual order lines does not require a Store Cross Reference record in order to include a location at its search results screen. As a result, if you use both options there is a possible discrepancy between the results listed at the [Merchandise Locator Search Results Screen](#) and those available for selection at the [Store Pickup Search Results Screen](#).

Order acceptance: errors

Credit card pay method only is required for Store Pickup

The Work with Order/Recap screen displays this error if there are any payment methods on the order are not credit cards.

Item(s) on order not identified as Store Pickup - select Store Pickup again.

The Work with Order/Recap screen displays this error if any items have been added to the order since you selected a store location at the [Store Pickup Search Results Screen](#). To correct, go back to the Work with Order Lines screen and select Store Pickup again.

Invalid email setup for Store Pickup order

There is no email address specified for the customer, or the associated opt-in/out setting is not O1 (all emails) or O2 (order-related emails). The email address and opt-in/out setting are required so that Order Administration can generate the store pickup notification email when the order is ready for pickup at the designated store location. See Store Pickup Notifications for more information.

Order creation and acceptance: things to note

Issue or Note	Explanation or Solution
If the Order Orchestration record is not created immediately after order acceptance	This situation can occur if communication with Order Orchestration is interrupted or if the Order Orchestration application is inactive. In this case, Order Administration creates a record in the Store Pickup tables to use as a trigger for each store pickup order that it needs to submit to Order Orchestration when the connection is restored. Order Administration also writes an Order Transaction History message such as <code>Submit Order Failed - OROB Unavailable.</code>
If Order Orchestration cannot create the order	If the selected store location was not created correctly in Order Orchestration—for example, if it was not assigned to the System Code, if any, for the Store Cross Reference record, or the Name in OROB for Point of Sale (L09)—then Order Orchestration responds to the <code>SubmitOrder</code> request indicating that it cannot create the order. In this case, Order Administration cancels the order using the Cancel Reason (Rejected Store Pickup Orders) (G11) and writes Order Transaction History messages such as the following: <pre>Submit Order Rejected/Order Canceled Rsn:INVALID FULFILLING LOCATION CODE. LO CATION (10) DOES NOT EXIST FOR SYSTE M (CWS) Order was maintained Web cancel request processed.</pre>
If the order is held	Order Administration uses its regular credit-checking routine at order acceptance of a store pickup order, and may put the order on hold. A held order status does not prevent Order Administration from submitting the store pickup order to Order Orchestration, although Order Administration does select the order's <i>Under Review</i> flag if the order is held and the Payment at POS for Store Pickup (M16) system control value is unselected. However, Order Administration removes the hold reason(s), if any, when the order is canceled for any reason (cancellation in Order Administration or Order Orchestration, an error in Order Orchestration, or rejection by the selected store) or is fulfilled. If a store pickup order was submitted with the <i>Under Review</i> flag selected, and the order is subsequently released from hold, Order Administration sends Order Orchestration an order update message indicating to clear the <i>Under Review</i> flag. See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) for a sample message.
Free gifts or promotional inserts	Once an order is flagged for store pickup, Order Administration does not add free gifts or promotional inserts when you accept the order. To prevent Order Administration from adding free gifts or promotional inserts, select the Store Pickup option before attempting repricing.

Issue or Note	Explanation or Solution
Batch order entry	When you work with store pickup orders in batch order entry, you might need to change or add individual order lines that are in error. After you do so, use the Store Pickup option and select a location where the customer can pick up the order.
Alternate Shipping Charges by Via Window still opens	Even if the Calculate Freight for Store Pickup Orders (L32) system control value is unselected, this window still opens in order entry. In this case, exit out of the window without making a selection.
Creating the Order Ship To Address record	Order Administration creates the Order Ship To Address record using the description and address from the Store Cross Reference record for the selected store.
Separate Order Orchestration record for each order line	There is a separate Order Orchestration record for each order line sent to Order Orchestration; however, the entire order has a single request ID, and creates a single order in Order Orchestration.
Entering a negative quantity	Although Order Administration does not prevent you from creating a store pickup order with a negative quantity, the order creates an error in Order Orchestration and cannot be processed normally. The error (<i>Index out of range</i>) is noted in Order Orchestration's error log.
System control value setting requirements for order API	If the order API receives a store pickup order, but the required system control values are not set correctly, the API creates the order and ignores the store pickup information in the CWOOrderIn messages. To create a store pickup order through the order API, as in interactive order entry, the Use Merchandise Locator (I38) system control value must be selected and the Store Pickup Order Type (L33) system control value must specify an order type.
After order creation: things to note	
If the order remains open rather than canceled when the selected location rejects the order or if Order Orchestration cannot create the order	If you have not specified a Cancel Reason (Rejected Store Pickup Orders) (G11), then the system cannot cancel the order, and the order remains open if it cannot be fulfilled through Order Orchestration.
Maintenance prohibited	You cannot maintain a store pickup after creation except to cancel it (although you can use batch order entry to correct an order received through the order API if there are any errors). See Canceling a Store Pickup Order for more information.
Returns prohibited	You cannot process a return in Order Administration against a store pickup order.
Email notifications for store pickup orders	You can select the different types of email notifications to generate from Order Administration based on the Cancel Reason (Rejected Store Pickup Orders) (G11). The <i>Email notification</i> flag for this order type must be selected in order to generate the store pickup notification to the customer when the order is ready for pickup. Also, the opt-in/out setting for the email address on the order must be O1 (all emails) or O2 (order-related emails).

Issue or Note	Explanation or Solution
Skipped by Process Auto Soldouts	The Process Auto Soldouts program ignores lines on store pickup orders. See Processing Auto Soldout Cancellations (MASO) ,

Troubleshooting the Order Orchestration Integration

See the Order Orchestration Web Services Guide on <https://support.oracle.com> (ID 2953017.1) for information on possible errors returned by Order Orchestration and additional troubleshooting information.

See also:

- [Order Orchestration Status Summary Table](#)
- [Things to Note About Brokered Backorders](#)
- [Things to Note about Retail Pickup \(including Ship-for-Pickup\) and Delivery Orders](#)
- [Troubleshooting Creation of Store Pickup Orders and Things to Note](#)
- [Order Orchestration Integration](#)
- [Reauthorization and Under Review Hold Scenarios for Orders Fulfilled through Order Orchestration](#)

Credit card authorization reversals: Authorization reversals take place when the Order Orchestration status is:

- C (Closed): The request was canceled before submission to Order Orchestration.
- E (Error): Order Orchestration returned an error response.
- J (Rejected): The order was rejected by the pickup location. Reversal takes place only for a pickup order.
- U (Unfulfillable): Order Orchestration cannot fulfill the order or line.
- Y (Pending Cancel): A request to cancel the order or line has been sent to Order Orchestration.
- Z (Canceled): Order Orchestration has confirmed that the order or line was canceled.

For more information:

- See [Order Orchestration Status Summary Table](#) for more information on Order Orchestration statuses.
- Use the *Order Broker Lines* option at the **Batch Job Statistics** page in Modern View to check the total number of Order Broker lines in the currently selected company, broken out by current status.

Problem	Possible Explanation
No fulfilling location is displayed at the Work with Order Broker Screen	Is the Order Orchestration request's status E (error), U (unfulfillable), C (Closed) or Z (canceled)? In this case, the order line will not be fulfilled through Order Orchestration.
The status of the Order Orchestration request is Closed, but there have not been any shipments	Order Administration changes the status of a brokered backorder request to C (closed) if you cancel it before it has been submitted to Order Orchestration (when its status is R (ready)).

Problem	Possible Explanation
A backordered order line is not being submitted to Order Orchestration for fulfillment	- Check that the order is eligible under the Rules for Submitting Backorders to Order Orchestration - Confirm that you have completed the Order Orchestration Configuration - Confirm that the customer is not flagged to <i>Bypass reservation</i> - Confirm that the item has the OROB eligible flag selected - If the order was previously in held status and then released, use the BROKER periodic function or select the order for maintenance and then accept your maintenance session
I created a ship-for-pickup order, but it is not listed at the Work with Order Broker Screen or on the Order Inquiry screen in Order Orchestration	If the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to NEVER, Order Administration does not send ship-for-pickup orders to Order Orchestration until you generate the pick slip. See Ship-for-Pickup Orders for an overview.
Order Orchestration returned an error	The error is displayed at the Display Order Broker History Screen. - An error of Null response from OROB indicates that the OROB Account (K49) system control value is not set correctly. - An error of Invalid Sold To address, missing req indicates that the sold-to customer is missing the first and last name or the company name; a first and last name or a company name are required for the sold-to customer on all orders sent to Order Orchestration. - An error of Duplicate Order/line (code 2040) indicates that the order or line was already created in Order Orchestration. This situation can occur if the <i>Use Duplicate Order Checking</i> option is selected in Order Orchestration and the order or line was already created there, but for some reason Order Administration did not receive or process the original response message. In this case, Order Administration puts the Order Orchestration record's status to Acknowledged, and the order line continues processing normally. See the Order Orchestration Web Services Guide on My Oracle Support (ID 2953017.1) for a list of possible errors that Order Orchestration might return to a Submit Order request.
Will there be Order Orchestration records in error if the Order Orchestration application is not running?	If Order Administration includes orders in a status inquiry list request and does not receive a response from Order Orchestration, the Order Orchestration records remain in their current status.
Where are messages logged between Order Administration and Order Orchestration?	If specified in the <i>XML Logging</i> setting at the Event Logging screen in Order Orchestration, Order Orchestration logs the messages.
Retail pickup and delivery orders not created in Order Administration	If the Send Inventory by Warehouse to OROB (L06) system control value is selected, Order Administration does not send fulfillment requests to Order Orchestration unless an <i>OROB location</i> is specified for the warehouse.

Problem	Possible Explanation
Ship-for-pickup orders are not created	An OROB_MESSAGE_VERSION of 16.0 or higher is required to use the Ship-for-Pickup Orders integration with Order Orchestration. Note that this property cannot be set higher than 19.9 for integration with Order Broker 19.x, or higher than 21.1 for integration with Order Orchestration 22.2.301.0 or higher.
Status updates are not generated when ship-for-pickup orders are in transit	The Order Type for Retail Pickup Orders Brokered to OROMS (K92) and Order Type for Orders Brokered for Delivery (K91) system control values must be populated to generate the status update message when a ship-for-pickup order is in transit.
Order initially created in Order Administration in error status, then put on hold after error corrected	Canceled by originating system? If an order is initially created in Order Administration in error status and then corrected, Order Administration sends an inquiry request to Order Orchestration before changing the order's status to open. If the response from Order Orchestration indicates that the originating system has canceled the order, Order Administration then puts the order on hold and writes an order transaction history message, such as: Order held - line[s] canceled in Order B.
Tax is not calculated correctly for the invoice on a fulfilling order, while it is calculated correctly on the originating order	Select the Tax on Freight (B14) system control value if this issue occurs.
Multiple invoices are created for the lines on a single order that was fulfilled on the same day	The invoice is consolidated for order lines that were previously in the same status and confirmed as fulfilled in the same status inquiry response from Order Orchestration, even if your company is not configured to consolidate invoices. Example: A line on the order is set to fulfilled in Order Orchestration at 9:00, and the other line at 9:02: - The two shipments create a single invoice if they are returned in the same status inquiry response. - The two shipments create two separate invoices if Order Administration receives the update on the second line in a separate status inquiry response. NOTE: - In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date. - If the Invoice Ship For Pickup Order Once Intransit (M73) system control value is selected, the invoice is created after the status inquiry response indicates a ship-for-pickup order is in transit or received, as well as fulfilled.
An order received from Order Orchestration is created in error status because the Price Override Limit Percent (E55) was exceeded	This situation can occur if the order includes a free or low-priced item, such as through a BOGO promotion. A possible solution to prevent this error is to set the Order Broker Price Override (K95) to a price override reason code whose <i>Override item offer price</i> flag is selected.

Problem	Possible Explanation
Delivery orders are in G (Resend Fulfilled) status, or ship-for-pickup orders are in H (Resend Intransit) status	Orders can be in these statuses if the order status update request message, generated to set their statuses to Complete (delivery order) or Intransit (ship-for-pickup order), did not receive a response from Order Orchestration. This might occur if, for example, message authentication failed or communication is down. In this case, the BROKER_ORD job resends the request the next time it runs.

Reauthorization and Under Review Hold Scenarios for Orders Fulfilled through Order Orchestration

Checking status in pick slip generation: A retail pickup or delivery order is put on AU (Broker Order Under Review) hold when:

- Pick slip generation sends a status list request to Order Orchestration, and
- The response message indicates that the order is under review.

Checking if under review through the BROKER process: When the BROKER integration layer process sends the status list request to Order Orchestration and receives a response indicating that an order is not under review, it removes the AU hold, if any, on the order. However, if the response from Order Orchestration indicates that the order is now canceled, the order is put on hold using the [Order Broker Hold Reason \(Cancel\) \(L02\)](#). If that system control value is blank, the order remains on AU hold.



Note:

If there are other holds on the order, they are not automatically removed.

When an originating order is put on AR hold: When both an originating and fulfilling order exist, the holds applied work as follows:

- A ship-for-pickup order or brokered backorder that originated in Order Administration was assigned by Order Orchestration to Order Administration for fulfillment, and Order Administration created a new fulfilling order.
- The originating order's initial authorization expired.
- The attempt to reauthorize the originating order through the REAUTH periodic function failed, and the originating order was put on AR hold.

In this case, the system:

- Applies the AU hold reason to the fulfilling order.
- Voids any pending pick slips that have expired authorizations. Also, writes an order transaction history record such as: Pick ##### voided due to expired auth.
- Writes an order transaction history message such as SYS-HLD - BROKER ORDER UNDER REVIEW, where BROKER ORDER UNDER REVIEW is the description of the hold reason code.
- If the Generic Pick Out API is in use, generates a trigger for a CWPickout message indicating that the pick slip was voided.

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

**Note:**

Drop ship pick slips or purchase orders, including those fulfilled through supplier direct fulfillment in Order Orchestration, are not updated when the reauthorization fails. You need to monitor these orders separately.

If the reauthorization is declined after shipment through the fulfilling order: It is possible, based on the timing of the REAUTH job and billing, that the REAUTH job can attempt to reauthorize the originating order after the fulfilling order has made the shipment. In this case, the system still sends the order update to Order Orchestration indicating to put the order under review, even though the order may already be closed in Order Orchestration. If the order is already closed, no additional automatic updates take place.

Releasing Orders from AR or AU Holds

Restrictions: Orders on AR (Declined Credit Card Authorization) or AU (Broker Order Under Review) system holds can only be released under the following conditions:

- AR: You cannot release an order on AR system hold unless the order has a valid authorization for the balance of the order. Otherwise, you can cancel the order.
- AU: You cannot release an order on AU hold through a screen in Classic or Modern View. Instead, based on the response received from Order Orchestration through the BROKER integration layer process, the AU hold is removed automatically if the response indicates that the order is no longer under review. Also, the order can be canceled based on the response received through the BROKER process.

Tracking User, Authority, and Password Updates

Overview: Order Administration tracks updates to users, and user classes, and external payment service settings in the User Audit table, and tracks user password changes in the Password Audit table.

User Audit table: The User Audit table tracks activity that has taken place in creating or changing user records, user classes, and user authority. The table also tracks changes to external payment services. The activities that trigger updates to the User Audit table include:

- Creating, changing, or deleting a user in Work with Users (WUSR), including updates to:
 - Company authority
 - Menu option authority
 - Secured features
 - Tickler group assignment
- Creating, changing, or deleting a user classes in Work with User Classes (WUCL), including updates to:
 - Company authority
 - Menu option authority
 - Secured feature authority
 - Vendor authority
- Changes to user or user class authority for order hold reasons (WOHR)
- Changes to user or user class authority for return disposition value codes (WRDV)

- Creating, changing, copying, or deleting a secured feature (WSYS or NSEC)
- Updating a user's email address (MUEE)
- Updating a user's default menu (pressing F17 at a menu screen)
- Creating or changing information at the Work with External Service screen (WASV)
- Deleting an active procedure (MACX)
- Creating, changing, or deleting an inbound or outbound web service user or client ID, and password or client secret in Work with Web Service Authentication (WWSA)
- Generating a client, updating access, updating a client secret, or refreshing the applications displayed at the Manage External Application Access page in Modern View (MEAA)

Reporting: Use the [Print User Security Audit Reports \(PUSA\)](#) menu option to generate reports of the activity tracked in the User Audit and Password Audit tables. Note that not all activity tracked in the User Audit table is included in these reports.

Purging the audit tables: The PURGEUA periodic function (*Program name* = PFR0215) purges User Audit and Password Audit records based on date.

Use the *Parameter* field for the periodic function to specify the number of days old a User Audit or Password Audit record must be to be eligible for purge. If the *Parameter* is blank or 0, records must be 365 days old to be eligible for purge.

In this topic:

- [User Audit Table Updates](#)
- [Fields Used by Updated Table \(User Audit\)](#)
- [Password Audit Table](#)
- [Print User Security Audit Reports \(PUSA\)](#)
 - [User Authority Change Report](#)
 - [Password Change Report](#)

User Audit Table Updates

The updates to the User Audit table, based on updates to users, user classes, and secured features, are described below. See the [Fields Used by Updated Table \(User Audit\)](#) for a listing of the fields updated in the User Audit table for each updated source table.

Field	Attributes	Description
Common Fields		The following fields are populated for all records in the User Audit table.
Change date	Numeric, 7 positions (CCYY/MM/DD format)	The date when the change occurred. Always populated.
Change time	Numeric, 6 positions (HHMMSS format)	The time when the change occurred. Always populated.

Field	Attributes	Description
B/A	Alphanumeric, 1 position	Indicates whether the record reflects: • A = The record after the activity. • B = The record before the activity. Change: A change to an existing record creates both an A and a B audit record. Addition: Creation of a new record creates just an A audit record. Deletion: Deletion of an existing record creates just a B audit record. Always populated.
Action	Alphanumeric, 1 position	The type of action that took place: • A = add • C = change • D = delete • E = edit access (used when you add or delete access through the Manage External Application Access option in Modern View (MEAA)) • R = refresh (used when you select the Refresh option at the Manage External Application Access page in Modern View (MEAA)) • S = regenerate secret (used when you regenerate a client secret through the Manage External Application Access option in Modern View (MEAA)) Always populated.

 Note:

Creating a new user results in audit records for the User and Users tables, as well as the User Extended table if you specify an email address. Additional table updates take place as you work with different types of user authorization, such as assigning authority to a company and then setting that company as the user's default.

Field	Attributes	Description
Updated table	Alphanumeric, 25 positions	The table updated by the activity. See the Fields Used by Updated Table (User Audit) for a listing, including the activities that create each type of audit record and the included fields. All fields populated: All fields that are populated in the updated table are populated in the audit record. For example, a user record includes a default company and a default output queue. If you make any change to the user record, the default company and default output queue are included in the before and after records, even if these settings have not changed. However, the User Authority Change Report includes fields only if they have been updated. Also, the report does not include all types of updates. Certain activities update multiple tables: For example, deleting a user also deletes the User Extended record, the Auth User Company record, and other dependent records. Always populated.
Updated by user	Alphanumeric, 10 positions	The ID of the user who performed the activity. Always populated.
Updated by user name	Alphanumeric, 30 positions	The name of the user who performed the activity at the time of the update. From the User record. Always populated.
Authority changed	Alphanumeric, 10 positions	The record affected by the activity. Possible authority entries: • a <i>user ID</i> when the user is created, changed, or deleted, or when an external payment service is changed • a <i>user class</i> when the user class is created, changed, or deleted • a <i>secured feature code</i> when the company-level secured feature is created, changed, or deleted Always populated except for records created when the updated table is Webservice Users, Webserviceout, and INT Cloud App Client.
Auth type	Alphanumeric, 1 position	The authority type affected by the activity. Possible types: • U = user ID (this code is also used for external auth service updates) • C = user class • F = secured feature Always populated except for records created when the updated table is Webservice Users, Webserviceout, and INT Cloud App Client.

Field	Attributes	Description
Name/ description	Alphanumeric, 30 positions	The name of the user, user class, or secured feature related to the activity. Always populated except for records created when the updated table is Webservice Users, Webserviceout, and INT Cloud App Client. User name: Populated with a user name by a change related to the user, when the <i>Updated Table</i> is User, Users, User Extended, Auth User Company, Auth User Feature, Auth User Menu Option, User Field Authority, or User Tickler Group. In the case of an External Payment Service update, this is the user who performs the update. From: - the <i>User name</i> set up through the User Control screen available through Advance Commands if the activity updates the Users table, even if the update took place through the Work with Users option. Fields in the Users table but also accessible through the Work with Users option include: - Advanced commands - All jobs authority - Status - Rank - the <i>Name</i> set up through Work with Users for any other activity related to the user. User class: Populated with the user class name by a change related to the user class, when the <i>Updated Table</i> is User Class, Auth User Class Company, Auth User Class Feature, Auth User Class Option, User Class Field Auth, or User Class Vend Auth. In this case, the <i>Name/ description</i> is the same as the User class description. Secured feature: Populated with the secured feature description, when the <i>Updated Table</i> is Secured Feature. In this case, the <i>Name/ description</i> is the same as the Secured feature description.

Field	Attributes	Description
Before/after changes	Alphanumeric, 512 positions	Lists the settings of any changed fields: • Before record: Lists the affected field settings before the activity. • After record: Lists the affected field settings after the activity. Example: You changed the default company for a user from 12: After: Default Company: 3 Before: Default Company: 12 This information is listed on the User Authority Change Report or on the generated spreadsheet file if the information's length exceeds the available space on the report. A <i>Before</i> record is not created as the result of a Refresh in Manage External Application Access (MEAA). Instead, there is just an <i>After</i> record, such as After: IDCS Refresh Applications job is executed by: FIRST.LAST. Note that the user name may be truncated.
Additional Fields		Each remaining field in the User Audit table is populated only if the corresponding source table includes the same field, and it is populated in the source table. For example, only the User table includes the CTI user type field, so this field can be populated in the User Audit table only for an audit record of a User record that has a CTI user type specified.

Field	Attributes	Description
Company	Numeric, 3 positions	The <i>Company</i> related to the update. Populated for the following tables by: <i>User</i>: Changing or deleting a user if a <i>Default company</i> was assigned. Not populated by adding a user, because you first need to assign company authority for a user before setting the default company. <i>Auth User Company</i>: Changing a user's company authority, or deleting a user who had company authority. When you delete a user with authority to multiple companies, a separate audit record is created for each authorized company. <i>Auth User Feature</i>: Adding or changing secured feature authority for a user. <i>User Class</i>: Adding, deleting, or changing the default company for a user class. <i>Auth User Class Company</i>: Adding or deleting company authority for a user class. <i>Auth User Class Feature</i>: Adding, changing, or deleting secured feature authority for a user class. <i>Auth User Class Vendor Auth</i>: Deleting authority to a vendor for a user class. <i>Secure Feature</i>: Creating, changing, or deleting a secured feature at the company level. <i>User Field Authority</i>: Adding, changing, or deleting authority to a hold reason code or a return disposition value for a user. <i>User Class Field Auth</i>: Adding, changing, or deleting authority to a hold reason code or a return disposition value for a user class. <i>External Auth Service</i>: Updating any settings at the Work with External Authorization Service screen. Updates that are not specific to a company, such as creating or updating web service users, have the company set to 0.
The following fields are populated only for User table updates, not for web service user updates.		
CTI user	Alphanumeric, 1 position	The <i>CTI user</i> setting for the created, changed, or deleted user. Possible settings: - Y = CTI user - N = User does not have fast path authority Populated only for User table updates.

Field	Attributes	Description
CTI user type	Alphanumeric, 1 position	The <i>CTI user type</i> setting for the created, changed, or deleted user. Optional field. Possible types: • 1 = Receive inbound only • 2 = Initiate outbound only • 3 = Inbound and outbound Populated only for User table updates.
CTI default screen	Alphanumeric, 1 position	The <i>CTI default screen</i> setting for the created, changed, or deleted user. Optional field. Possible settings: • 1 = Always display CTI screen • 2 = Display CTI screen with call Populated only for User table updates.
CTI default phone ext	Alphanumeric, 4 positions	The <i>CTI telephone extension</i> setting for the created, changed, or deleted user. Optional field. Populated only for User table updates.
User class	Alphanumeric, 10 positions	Populated for the following tables by: • <i>User</i>: Creating, updating, or deleting a user with a User class assigned. Optional field. • <i>User Class</i>: Creating, updating, or deleting a user class. • <i>Auth User Class Company</i>: Changing the company authority for a user class, or deleting a user class. • <i>Auth User Class Feature</i>: Deleting or changing the feature authority for a user class. • <i>Auth User Class Option</i>: Changing user class menu option authority, or deleting a user class. • <i>User Class Vendor Auth</i>: Deleting vendor authority for a user class. • <i>User Class Field Auth</i>: Adding, changing, or deleting authority to a hold reason code or a return disposition value for a user class.
User class description	Alphanumeric, 30 positions	The <i>Description</i> of the created, changed, or deleted user class. Populated only for User Class table updates.

Field	Attributes	Description
Default authority	Alphanumeric, 8 positions	Possible settings are: • *ALLOW • *EXCLUDE • *DISPLAY (menu option authority only) Populated for the following tables by: • <i>User</i>: Creating, changing, or deleting a user. • <i>User Field Authority</i>: Adding, changing, or deleting authority to a hold reason code or a return disposition value for a user. • <i>Auth User Feature</i>: Adding or changing secured feature authority for a user. • <i>Auth User Menu Option</i>: Adding, changing, or deleting menu option authority for a user. • <i>User Class Field Authority</i>: Adding, changing, or deleting authority to a hold reason code or a return disposition value for a user class. • <i>Auth User Class Option</i>: Adding, changing, or deleting menu option authority for a user class. • <i>Auth User Class Feature</i>: Adding or changing secured feature authority for a user class. • <i>Secure Feature</i>: Changing the default authority for a secured feature at the company level.
Log use	Alphanumeric, 1 position	The <i>Log use</i> setting for the created, changed, or deleted user. Optional field. Possible settings: • Y = Log use • N or blank = Do not log use Populated only for User table updates.
Security adm	Alphanumeric, 1 position	The <i>Security administrator</i> setting for the created, changed, or deleted user. Optional field. Possible settings: • Y = Security administrator • N or blank = Not a security administrator Populated only for User table updates.
Allow fast path	Alphanumeric, 1 position	The <i>Fast path</i> setting for the created, changed, or deleted user. Optional field. Possible settings: • Y = User has fast path authority • N or blank = User does not have fast path authority Populated only for User table updates.
Output queue	Alphanumeric, 10 positions	The default <i>Output queue</i> for the created, changed, or deleted user. Optional field. Populated only for User table updates.
Menu	Alphanumeric, 10 positions	The <i>Default menu</i> setting for the created, changed, or deleted user. Optional field. Populated only for User or User Class table updates.

Field	Attributes	Description
Language	Alphanumeric, 3 positions	The <i>Language</i> for the created, changed, or deleted user. Optional field. Populated only for User table updates.
E-mail address	Alphanumeric, 50 positions	The user's <i>Email address</i> . Populated only for User Extended table updates.
Secured feature	Alphanumeric, 3 positions	The code identifying the secured feature. Populated for the following tables by: • <i>Auth User Feature</i>: Adding or changing secured feature authority for a user. • <i>Auth User Class Feature</i>: Adding or changing secured feature authority for a user class. • <i>Secured Feature</i>: Adding, changing, or deleting a secured feature at the company level.
Secured feature desc	Alphanumeric, 40 positions	The description of the secured feature. Populated only for Secured Feature updates.
Tickler grp ID	Alphanumeric, 10 positions	The code identifying the tickler group added to or deleted from the user. Populated only for User Tickler Group updates for a user.
Vendor#	Numeric, 7 positions	The vendor whose authority was changed for the user class. Populated only for User Class/ Vendor Auth updates.
CPG program	Alphanumeric, 10 positions	Not currently implemented.
Hold reason	Alphanumeric, 2 positions	The code identifying a: • hold reason code if the <i>User field auth type</i> is HR, or • return disposition value if the <i>User field auth type</i> is RD Populated for the following tables by: • <i>User Field Authority</i>: Creating, changing, or deleting user authority to a hold reason code or a return disposition value. • <i>User Class Field Authority</i>: Creating, changing, or deleting user class authority a hold reason code or a return disposition value.
User field auth type	Alphanumeric, 2 positions	The code identifying the type of user field changed. Possible values: • HR = hold reason code • RD = return disposition value Populated for the following tables by: • <i>User Field Authority</i>: Creating, changing, or deleting user authority to a hold reason code or a return disposition value. • <i>User Class Field Authority</i>: Creating, changing, or deleting user class authority a hold reason code or a return disposition value.

Field	Attributes	Description
Menu option	Alphanumeric, 4 positions	The <i>Fast path</i> identifying a menu option. Populated for the following tables by: <i>Auth User Menu Option</i>: Adding, changing, or deleting menu option authority for a user. <i>Auth User Class Option</i>: Adding, changing, or deleting menu option authority for a user class.
UDF seq#	Numeric, 5 positions	Not currently implemented.
Use LDAP	Alphanumeric, 1 position	Indicates if the user is flagged for LDAP authentication. This setting is always set to N since LDAP authentication is not currently implemented. Populated only for User table updates.
Domain	Alphanumeric, 10 positions	The domain to use for LDAP authentication. Populated only for User table updates. Not currently implemented.
LDAP name	Alphanumeric, 50 positions	The user name that matches the network user ID for network authentication. Used only for LDAP authentication, which is not currently implemented. Populated only for User table updates.
Locale	Alphanumeric, 2 positions	The two-position code identifying the user's locale. Possible locales: - de = German - en = English - es = Spanish - fr = French - it = Italian
Date Format	Alphanumeric, 3 positions	The three-position code identifying the date format for the user. Possible date formats: - DMY = DDMMYY format - MDY = MMDDYY format - YMD = YYMMDD format



Note:

The current date format at the time of the change is included in the Before and After entries for each user change.

Field	Attributes	Description
Rank	Numeric, 1 position	The user's authority rank. Set to: 1 = the user can see and edit all other users through the User Control option (admin-level user authority). If the <i>All jobs</i> flag is selected, the user also has access to other users' documents and forms at the Document Management and Form Management screens. Note: Assign this authority only to those users whose responsibilities require it. - any value from 2 to 9 = the user can use the User Control screen only to change his or her own password if IDCS or OCI IAM is not in use, and has access to the documents and forms of other users (through the My Docs and My Forms options) only if those users share the same rank assignment and the <i>All jobs</i> flag is selected. For example, a user assigned to rank 5 has access to the forms of other users who are also assigned to rank 5. Populated only for Users table updates made either through the Work with Users option, or the User Control screen available through Advanced Commands.
Advanced command	Alphanumeric, 1 position	Set to: - Y = user should has authority to the Advanced Commands option through My Docs, My Forms, or My Jobs - N = the user does not have authority to the Advanced Commands option through My Docs, My Forms, or My Jobs Populated only for Users table updates made either through the Work with Users option, or the User Control screen available through Advanced Commands.

Field	Attributes	Description
Password expired	Alphanumeric, 10 positions	Indicates when the password for a user expires when IDCS or OCI IAM is not enabled. Valid values are: *NO = the password does not expire; for security reasons, this setting is not recommended. - expiration date in MM/DD/YYYY format = If the expiration date is on or earlier than the current date, then the next time the user logs in Order Administration advances directly to the Password Expired screen. The user will need to change the password before it is possible to advance to another screen. Populated only for Users table updates through either the Work with Users option or the User Control screen available through Advanced Commands.
All jobs authority	Alphanumeric, 1 position	Indicates the user's authority to other users' submitted jobs: - Y = the user can see and has authority to all other users' jobs. Note: Assign this authority only to those users whose responsibilities require it. If this flag is selected and the <i>User rank</i> is: – 1: the user has access to all other users' documents and forms. – 2 through 9: the user has access to the documents and forms of other users of the same rank. • N = the user can see and has authority only to the jobs, documents, and forms associated with the user's own user ID. Populated only for Users table updates made either through the Work with Users option, or the User Control screen available through Advanced Commands.
Status	Alphanumeric, 10 positions	Indicates if the user has access to Order Administration. Possible settings: *ENABLED = the user can use Order Administration. *DISABLED = the user cannot use Order Administration. Populated only for Users table updates made either through the Work with Users option, or the User Control screen available through Advanced Commands.

Field	Attributes	Description
Job Name	Alphanumeric, 200 positions	The code identifying the job whose active procedure was deleted. Used only when the updated table is Active Procedure.
Job Number	Numeric, 19 positions	The number identifying the active procedure that was deleted. Used only when the updated table is Active Procedure.

Fields Used by Updated Table (User Audit)

Fields for all audit records: All records in the User Audit table use the following fields:

- [Change date](#)
- [Change time](#)
- [B/A](#)
- [Action](#)
- [Updated table](#)
- [Updated by user](#)
- [Updated by user name](#)
- [Before/after changes](#)

Additional fields for different types of audit records: Additional fields used for the different possible updated tables are listed below:

Table	Fields	Ways to Update/Sample Report Entries
User	Authority changed Auth type Company CTI user CTI user type CTI default screen CTI default phone ext User class Default authority Log use Security adm Allow fast path Menu Language Name/ description Use LDAP Domain LDAP name Locale Date Format	Work with Users (WUSR): - Create - Change  Note: The User Audit table is updated only if a change is made - Delete Press F17 from a menu screen to make the current menu the default Sample entries on the User Authority Change Report: - Before: Menu: HOME2 - After: Menu: HOME  Note: Optional fields, such as

Table	Fields	Ways to Update/Sample Report Entries
		the Output queue , CT Insert tions , and User classes , may be blank for the

Table	Fields	Ways to Update/Sample Report Entries
		audit record.
Users	Authority changed Auth type Name/ description from Users table Rank Advanced command Password expired All jobs authority Status	Work with Users (WUSR): - Create - Change  Note: The User Audit table is updated only if a change is made - Delete The User Control screen available through Advance Commands Sample entries on the User Authority Change Report: - Before: Rank: 9 - After: Rank: 1
User Extended	Authority changed Auth type E-mail address Name/ description from User table	Work with Users (WUSR): - Create - Change ( Note: The User Audit table is updated only if a change is made - Delete Update Email Address Domain (MUEE) Sample entries on the User Authority Change Report: - Before: Email Address: - After: Email Address: <EMAIL_ADD>

Table	Fields	Ways to Update/Sample Report Entries
Auth User Company	Authority changed Auth type Company Name/ description from User table	WUSR: • Company auth (any change) • Delete Sample entry on the User Authority Change Report : After: User: USER_ID Company Authority: <CMP_NO>

Table	Fields	Ways to Update/Sample Report Entries
Auth User Feature	Authority changed Auth type Company	WUSR: Feature auth (any change) Delete Sample entry on the User Authority Change Report: After: User: USER_ID Feature: A01 Default Company: <CMP_NO> Default Authority: *ALLOW, where A01 identifies the secured feature, and the Default Company is the company where the feature authority was set

Table	Fields	Ways to Update/Sample Report Entries
		d t h e f u n c t i o n a u t h o r i t y , e v e n i f t h e u s e r d o e s n o t h a v e a u t h o r i t y t

Table	Fields	Ways to Update/Sample Report Entries
		o t h e c o m p a n y .
	Default authority Secured feature Name/ description from User table	
Auth User Menu Option	Authority changed Auth type Default authority Menu option Name/ description from User table	WUSR: - Menu option auth (any change) - Delete Sample entry on the User Authority Change Report : After: User: USER_ID Menu Option: DABJ Default Authority: *ALLOW
User Field Authority	Authority changed Auth type Company This is the company that was active when you changed the function authority, even if the user does not have authority to the company. Default authority Hold reason User field auth type Name/ description from User table	Work with Order Hold Reasons (WOHR): User release auth (any change) Work with Return Disposition Values (WRDV): User authority (any change) WUSR: Delete Sample entry on the User Authority Change Report : After: User: <USER_ID> Hold Reason: AT Type: HR Default Authority: *ALLOW
User Tickler Group	Authority changed Auth type Tickler grp ID Name/ description from User table	WUSR: Tickler group (assigning or deleting) Sample entry on the User Authority Change Report : After: User: <USER_ID> Tickler Group: BASIC

Table	Fields	Ways to Update/Sample Report Entries
User Class	Authority changed Auth type Company User class Menu User class description Name/ description of the user class (same as the User class description)	Work with User Classes (WUCL): Create Change Note: The User Audit table is updated only if a change is made Delete Sample entries on the User Authority Change Report: Before: Default Company: 0 After: Default Company: 6

Table	Fields	Ways to Update/Sample Report Entries
		u m a y b e b l a n k f o r t h e a u d i t r e c o r d .
Auth User Class Company	Authority changed Auth type Company User class Name/ description of the user class	WUCL: Company auth (adding or removing) Sample entry on the User Authority Change Report : After: User Class: OE Company Authority: <CMP_NO>
Auth User Class Feature	Authority changed Auth type Company User class Default authority Secured feature Name/ description of the user class	WUCL: Feature auth (any change) Sample entry on the User Authority Change Report : After: User Class: CS2 Feature: A05 Default Company: <CMP_NO> Default Authority: *EXCLUDE, where A05 is the secured feature, and Company <CMP_NO> is the company where the feature was set

Table	Fields	Ways to Update/Sample Report Entries
Auth User Class Option	Authority changed Auth type User class Default authority Menu option Name/ description of the user class	WUCL: Menu option auth (any change) Sample entry on the User Authority Change Report : After: User Class: CS2 Menu Option: DABJ Default Authority: *ALLOW
External Auth Service	Authority changed Company Name/ description of the user who performed the update	WASV: Enter or change any information at the Work with External Authorization Service Screen The Authentication User and encrypted Authentication Password are included if they were changed. The Auth Service code is always included. Sample entry on the User Authority Change Report : After: Auth Service: EXT Url: https://server.<HOSTNAME>.com:<PORT>/CC-REST/cc/Test User: authUser Password: <ENCRYPTED_PASSWORD>
User Class Field Auth	Authority changed Auth type Company This is the company that was active when you changed the function authority, even if the user does not have authority to the company. User class Default authority Hold reason User field auth type Name/ description of the user class	Work with Order Hold Reasons (WOHR): User release auth (any change) Work with Return Disposition Values (WRDV): User authority (any change) Sample entry on the User Authority Change Report : After: User Class: CS2 Hold Reason: DH Type: HR Default Authority: *ALLOW
User Class Vend Auth	Authority changed Auth type Company User class Vendor# Name/ description of the user class	WUCL: Vendor auth (*EXCLUDE, deletion only) Sample entry on the User Authority Change Report : Before: User Class: CS2 Company: <CMP_NO> Vendor: <VENDOR_NO>

Table	Fields	Ways to Update/Sample Report Entries
Secured Feature	Authority changed Auth type Company Default authority Secured feature Secured feature desc Name/ description of the secured feature	Work with System Values/Features (WSYS): Secured features: • Create • Copy • Change  Note: The User Audit table is updated only if a change is made • Delete Process New Secure Feature Values (NSEC) Sample entries on the User Authority Change Report: • Before: Default Authority: *ALLOW • After: Default Authority: *EXCLUDE Purge Active Procedures Across Users (MACX): Select Delete for an active procedure.
Active Procedure	Company Job Name Job Number	 Note: • You cannot delete an active procedure that is actually running on a server. • Active Procedure records are not included in the User Authority Change Report (PUSA).
INT Cloud App Client	No additional fields updated.	Manage External Application Access (MEAA) in Modern View creates records for the following Action types: • A: Generate a client • R: Refresh • S: Regenerate a client secret Sample Before/after changes entry: IDCS Refresh Applications job is executed by: FIRST.LAST.

Table	Fields	Ways to Update/Sample Report Entries
Webservice Users	No additional fields updated.	Work with Web Service Authentication (WWSA) creates records for the following Action types: • A: Add an inbound web service user • D: Delete an inbound web service user Manage External Application Access (MEAA) in Modern View creates records for the following Action types: • E: Edit web service access for a client • S: Regenerate a client secret Sample Before/after changes entry: After: Webservice: CWPickOut User: FIRST.LAST
Webserviceout	No additional fields updated.	Work with Web Service Authentication (WWSA) creates records for the following Action types: • A: Add an outbound web service user and password, or client ID and secret • C: Change authentication type, password, or client secret for an outbound web service Sample Before/after changes entry: After: Webservice: Job Notification Only Client Secret is changed

Password Audit Table

Password changes are not tracked when the IDCS_ENABLED property is set to `true`. Once IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) use is enabled, password tracking ends; however, password audit records created before IDCS or OCI IAM use was enabled remain in the table.

The information in the Password Audit table is listed below:

Field	Attributes	Description
Change date	Numeric, 7 positions (CCYY/MM/DD format)	The date when the change occurred.
Change time	Numeric, 6 positions (HHMMSS format)	The time when the change occurred.
User ID of password	Alphanumeric, 10 positions	The user ID whose password was updated.
User name	Alphanumeric, 30 positions	The name of the user. From the <i>Name</i> set up through Work with Users.
Updated by user	Alphanumeric, 10 positions	The ID of the user who performed the activity.
Updated by user name	Alphanumeric, 30 positions	The name of the user who performed the activity at the time of the update. From the User record.

Translating Special Characters

Certain special characters cannot be passed in an attribute of an XML message except through the use of replacement text strings. For outbound XML messages, Order Administration replaces these with the text strings listed below. Similarly, for inbound messages, you can pass the special characters listed below by replacing them with the related text strings. For example, if the item description includes a double quote, Order Administration replaces it in the `item_description` attribute in the *Detailed Order Response Message: Sample XML* with `"`. Similarly, you can pass a single quote in the `line_hyperlink` attribute in the *Inbound Order XML Message (CWORDERIN)* by replacing it with `'`

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

If an inbound message includes any of the special characters listed below without using the replacement text string, the system returns an error: `Cannot Parse XML Message` or `Invalid XML Message`.

Special Character	Description	Replacement Text String
'	single quote	'
"	double quote	"
>	greater than	>
<	less than	<
&	ampersand	&

Other special characters (such as \$ or !) can be passed in an attribute of an XML message without using replacement text strings.

Warehousing

- [Performing Inventory Transactions](#)
- [Transaction History](#)
- [Inventory Transaction Setup](#)
- [Item Where Used](#)
- [Purchase Order Receipts](#)
- [Managing Warehouses](#)
- [Docking Purchase Orders](#)
- [Warehouse Management Integration](#)

Performing Inventory Transactions

Topics in this part: This part describes how to perform inventory transactions.

- [Working with Inventory Transactions \(WITI\)](#) tells you how to perform transactions which change inventory immediately.
- [Working with Inventory Transaction Errors \(WITE\)](#) allows you to review all of the errors that have occurred while performing inventory transactions.
- [Finished Good Work Order Processing \(WWOR\)](#) allows you to reserve component items while you assemble a finished good.

Transaction History

Topics in this part: The following topics describe the history information maintained for inventory transactions and how to display and print this information.

- [Display Inventory Transaction History \(DITH\)](#) describes the amount of history available, describes the inventory transaction history scan screen, and tells you how to display a specific record.
- [Print Inventory Transaction History \(PITH\)](#) tells you how to use the selection screen and how to print inventory transaction history. It also describes a sample report.

Inventory Transaction Setup

Topics in this part: The following topics describe the setup required to perform inventory transactions.

- [Work with Inventory Transaction Codes \(WITC\)](#) explains the purpose of transaction codes, tells you how to work with the code scan screen, and tells you how to create, change, display, delete, and print transaction codes.
- [Work with Inventory Transaction Reason Codes \(WIT1\)](#) explains how to use the Transaction Reason Code scan screen, and how to create, change, display, delete, and print a list of reason codes.

- [Verifying Inventory Sharing \(VISH\)](#) explains how to generate the [Verify Inventory Sharing Report](#), which lists the items in the sharing warehouse that are not setup correctly for inventory sharing.

Item Where Used

Topics in this part: The following topics describe the finished good explosion functions and the reports they produce.

- [Finished Good/Component On Hand \(MFGO\)](#) defines the terms used in this topic.
- [Explode Finished Good Items \(MKEX\)](#) defines the purpose of this function, describes the Finished Good Explosion screen, and describes a sample report.
- [Where Finished Good Component Item Usage \(MKCU\)](#) defines the purpose of this function, displays the Where F. Good Component Item Usage screen, and explains the sample report.
- [Where Set Component Item Usage \(MSCU\)](#) defines the purpose of this function, displays the Where Set Component Item Usage screen, and explains the sample report.
- [Where Variable Set Component Item Usage \(MVCU\)](#) defines the purpose of this function, displays the Where Variable Set Component Item Usage screen, and describes the sample report.

Purchase Order Receipts

Topics in this part: The following topics describe the functions available when using receiving merchandise from your vendors.

- [Purchase Order Receiving Overview](#) describes the options available when receiving purchase orders, explains how the system determines the cost of an item and how the Suggest Warehouse Placement function works, and shows you how to locate the function.
- [Working with P/O In Transit Information \(MPIT\)](#) shows you how to quickly update a purchase order with shipping information.
- [Selecting Purchase Orders for Receipt \(PORC\)](#) shows you how to enter the purchase order number you want to post receipts against, and how to scan for open purchase orders.
- [Receiving Purchase Orders \(PORC\)](#) describes the various methods of posting receipts to a purchase order, shows you how to post receipts using each of the available methods, and describes each of the options available in PO receipts.
- [Placing Suspended Stock \(SUSP\)](#) shows you how to transfer merchandise from suspense to inventory.

Purchase Order Receiving Overview

Purpose: Use purchase order receipts to record the receipt of inventory on open purchase orders.

You can record receipt:

- in the warehouse, to record stock receipts immediately as merchandise is being brought into the warehouse.
- as an office function, where receipts are entered after the merchandise is put away.

Purchase Order Receipt In API: You can use the Purchase Order Receipt In API to process PO receipts received from another system, such as a warehouse management system. See the *Purchase Order Receipt In API* for an overview and the required setup.

PO download triggers: The setting of the [Create Generic PO Download Trigger for PO Receipt \(K27\)](#) system control value determines whether the system creates a purchase order download (POH) trigger when a purchase order line is received. See *Generic Outbound Purchase Order API* for an overview.

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

In this topic:

- [Docking Stock](#)
- [Receiving Merchandise into Suspense](#)
- [Receiving Merchandise into a Pending Warehouse](#)
- [Suggest Location Placement](#)
- [Additional Functions During Purchase Order Receiving](#)
- [Warning about Conflicting Jobs](#)
- [Receipt Cost Calculation](#)
- [Distributing Overhead Costs](#)
- [Receiving Inventory](#)
- [Suggest Warehouse/Location Placement](#)
- [Receiving Overages and Underages](#)

For more information:

- [Maintaining Purchase Orders](#)
- [Purchase Order Inquiry \(MPOI\)](#)

Docking Stock

You have the option of recording a purchase order as "docked" before you receive it. A docked status indicates that you have received inventory associated with the purchase order, but have not yet confirmed items or quantities. You can dock a purchase order just once or many times for different deliveries. Until you actually receive the purchase order, inventory inquiries do not indicate that any of the associated inventory is on-hand in your warehouse.

A standard process might include:

- dock the purchase order
- count the merchandise and perform quality control
- receive the purchase order

Docking stock provides a record of when the inventory actually arrived at your warehouse, as opposed to when you completed quality control and recorded the receipt. This can be helpful if there is a question on whether the vendor delivered the merchandise on time.

If you dock stock, the system assigns a purchase order receipt control number at the time you dock it.

For more information: See [Docking Purchase Orders](#).

Receiving Merchandise into Suspense

Receiving merchandise into suspense gives you the opportunity to inspect the merchandise before it becomes part of your inventory. Once the inventory has been inspected, you can transfer the inventory to its final destination. See [Receiving into Suspense](#) for more information.

Receiving Merchandise into a Pending Warehouse

Pending warehouses are warehouses where you can place inventory that is on its way to its final destination, for example, a staging area.

Use a *pending putaway* warehouse to temporarily store saleable inventory on its way to its final destination warehouse. Inventory received into a *pending putaway* warehouse retains its on order status so that the inventory is visible in PO Layering, yet the system recognizes the inventory as being in a warehouse location so that you can manipulate it.

You can define a warehouse as a pending warehouse using the [Working with Default Warehouse Locations \(WWDL\)](#) menu option.

When you place stock in a pending putaway warehouse, the system creates a record in the Pending Putaway Detail table. See [Pending Putaway Overview](#) for more information.

Suggest Location Placement

Use Suggest Location Placement to have the system recommend the locations where the inventory should be placed.

Values in the System Control table determine how this feature works. If you use a staging warehouse to receive inventory before you put it away, the system would suggest locations within your staging warehouse; the staging location indicates where the stock should ultimately be placed. See [Working with Default Warehouse Locations \(WWDL\)](#) for information on using a staging warehouse.

Additional Functions During Purchase Order Receiving

During Purchase Order Receiving, you can also add, change or view the messages associated with the purchase order, a line item on the purchase order, or with the vendor.

Warning about Conflicting Jobs

A warning pop-up window opens automatically when you select this option if Pick Slip Generation is active (in the Active Procedures table).

Reason: The warning pop-up window opens because each of these options affect inventory at the location level in the warehouse, as does the current option you are trying to use.

Responding to the Warning: Select OK to use the option anyway or select Exit to receive the items into inventory at a later time when the other jobs are finished running.



Note:

The warning pop-up window(s) opens again if you selected OK at the first warning window to perform the receipt, then selected Accept to accept your entries. You can select OK to continue or Exit to wait to receive the inventory until the conflicting job has finished.

Receipt Cost Calculation

The system does not recalculate standard cost at purchase order receipt. You enter and maintain all cost information; the system does not update any cost information automatically.

The system retains the standard cost for each item, the cost at receiving for each receipt, and the cost at payables for each item invoiced. Overhead charges for a purchase order or a vendor/item are not included in the cost at receiving.

You can update the standard cost with the landed cost (primary vendor price + additional charges) through:

- the *Update Standard Cost* periodic function (see [Working with Periodic Functions \(WPER\)](#))
- creating your own query reports to compare the standard cost of an item against its current cost, and making any necessary adjustments manually.

The system includes the following in the receipt cost calculation:

- cost of item
- discounts: You can include the following discounts in the receipt cost calculation:
 - primary vendor discount: (from the Discount % (Primary discount percentage) field.
 - additional vendor discounts: Discounts in Work with Vendors.
 - vendor terms discount: from the Terms field. The [Vendor Discount % to Costing at Receiving \(D76\)](#) system control value must be selected in order for the system to include the vendor terms discount.
- additional charges. You can include the following additional charges in the receipt cost calculation:
 - purchase order additional charges: You can define purchase order additional charges at the [Work with PO Header Estimated Charges Screen](#) and Work with PO Detail Estimated Charges Screen.
 - vendor item additional charges: You can define vendor item additional charges at the [Work with Vendor Item Add'l Charges Screen](#).
- costing calculation method: The system calculates the receipt cost using the item cost plus any additional charges and discounts.

Distributing Overhead Costs

Overhead costs: When you receive a shipment, you might incur additional costs that you want to distribute across the cost of all items received. These costs might include freight charges, duty charges, import charges, brokerage fees, commissions, surcharges or any other user-defined costs.

You can include overhead costs in the cost of an item by applying them to items:

- received on a single purchase order
- purchased from specific vendors

When the [Allow Additional Costs to P/O Receipts \(A60\)](#) system control value is selected, the system allows you to advance to the Work with Additional Charges, where you can enter the overhead costs associated with the purchase order.

Additional PO estimated charges: You can also define overhead costs to apply to each detail line on a purchase order or to a specific detail line on a purchase order if the [Include PO Estimated Charges in Receipt Cost Calculation \(G29\)](#) system control value is selected.

Additional charge calculation guidelines: The table below presents the guidelines the system uses in determining the purchase order additional charges to factor into the cost of an item at purchase order receipt when using receipt controls.

Standard PO Receipt Cost Calculation Method	Vendor Item Additional Charges (Charges in WVENI)	PO Additional Estimated Charges (Est charges when creating the PO or Estimated charges when maintaining)
NA	All, whether unit or percentage, if Default Vendor Item Additional Charges (I21) is selected and Include PO Estimated Charges in Receipt Cost Calculation (G29) is selected	All, whether unit or percentage, if Include PO Estimated Charges in Receipt Cost Calculation (G29) is selected

Which costs are updated? The *Average cost* and the *Last purchase cost* in the SKU table are always updated when you receive a purchase order.

The standard cost is not updated at purchase order receipt.



Note:

Additional charges you enter by selecting Add'l Charges when receiving a specific purchase order do not update any of the costs in the SKU table.

Additional costing factors: The following system control values control the discounts you factor into the *Last purchase cost* in the SKU table based on purchase order receiving:

- [Vendor Discount % to Costing at Receiving \(D76\)](#): If this field is selected, the system applies the terms code assigned to the vendor through [Working with Vendors \(WVEN\)](#), and subtracts the related discount percentage from the cost at receiving.
- [Apply Discount To Manual Cost \(D96\)](#): If this field is selected, the system subtracts any discounts assigned to the vendor.

Receiving Inventory

Receiving choices: You can receive merchandise:

- Directly into inventory: the system updates inventory immediately, and the merchandise is available to be reserved and picked. See [Receiving into Inventory](#).
- Into suspense: inventory is not updated until the merchandise is transferred from suspense to inventory. Suspended merchandise is not available for reservation and picking. You control whether merchandise can be received into suspense by completing the [Allow Receipt to Suspense \(A59\)](#) system control value. You can receive an entire purchase order into suspense, or only specific items. You determine how the inventory will be received during purchase order receipts. See [Receiving into Suspense](#).
- Into a pending putaway warehouse: the system creates a record in the Pending Putaway Detail table and creates a PO layering record for the “final destination” warehouse. The pending putaway detail record indicates the quantity to be placed in the “final destination” warehouse and the expected due date when the inventory will be moved. See [Receiving into a Pending Warehouse](#).
- Into a staging warehouse: you would normally define the staging warehouse as non-allocatable, and the staging locations as non-pickable, to prevent the system from attempting to reserve or pick from the staging area. See [Receiving into a Staging Warehouse](#).

When the entire quantity of the item is received, the purchase order detail line is closed. When the entire purchase order is received, the purchase order is closed. See [Receiving Overages and Underages](#) for information on special receipt quantities.

Receiving into Inventory

When merchandise is received directly into inventory, it is available for reservation and picking immediately.

If you receive merchandise directly into inventory, the following system updates occur at receiving:

- The on-order quantity for the item is decreased
- The on-hand quantity of the item is increased in the item warehouse and the item location.
- Vendor item analysis is performed

All or part of a purchase order can be received into inventory.

You can use the Suggest Location Placement function to recommend the locations where the items should be placed when the inventory is received. See [Suggest Warehouse/Location Placement](#).

Receiving into Suspense

Placing merchandise into suspense can help you quickly move merchandise from the loading dock to a secured setting where it can be processed for quality control.

When merchandise is received into suspense:

- It is not available for order fulfillment.
- Inventory is not updated until the merchandise is transferred from suspense to inventory.
- Suspended merchandise is not available for reservation and picking.

To receive into suspense: You can receive merchandise into suspense only if the [Allow Receipt to Suspense \(A59\)](#) system control value is selected.

Inventory can be received into suspense using the [Work with P/O Receipt Detail Screen](#):

- You can receive the entire balance of the purchase order into suspense using the Receive Suspense option. In this situation, the quantity due for each item on the purchase order is placed into suspense and the purchase order is closed. See [Receiving an Entire Purchase Order Into Suspense](#) for instructions.
- You can receive a purchase order line into suspense using the Suspense On/Off option: Select this option for an item on a purchase order to change the suspense receiving status of the line. The word *Suspense* displays next to the *Location* field and indicates the line item will be placed into suspense when the purchase order is accepted. If the word *Suspense* is not displayed, the quantity received for the line will be placed into inventory. A *Location* is not required if you are placing the item into suspense. See [Using the Direct Entry Method](#) or [Using the Change Purchase Order Details Method](#) for instructions on working with individual line items during PO Receipts.

Suspense updates: The system performs the following updates when merchandise is received into suspense:

- Creates a record in the PO Suspense table for each purchase order line indicating the quantity received into suspense.
- Creates a record in the PO Receipt table for each purchase order line, with the *Suspense flag* set to Y.

- Updates the *Received quantity* for each purchase order line on the Purchase Order History screen by the quantity received into suspense.
- Decreases the *Quantity Due* for each purchase order line on the [First Display Purchase Order Detail Screen](#) by the quantity received into suspense.
- Updates the *Suspense quantity* on the Display Item/Warehouse Information Screen by the quantity received into suspense.

The following updates *do not occur* when merchandise is received into suspense:

- The on-hand quantity for the item is not changed.
- The costing calculation is not performed.
- Vendor Item analysis is not performed.

These updates occur when the merchandise is transferred from suspense to inventory using the [Placing Suspended Stock \(SUSP\)](#) menu option.

Receiving into a Pending Warehouse

Pending warehouses are warehouses where you can place inventory that is on its way to its final destination, for example, a staging area. Inventory in a pending warehouse is not available for reservation and picking.

Use a *pending putaway* warehouse to temporarily store saleable inventory on its way to its final destination warehouse. Inventory received into a *pending putaway* warehouse retains its on order status so that the inventory is visible in PO Layering, yet the system recognizes the inventory as being in a warehouse location so that you can manipulate it.

You can define a warehouse as a pending warehouse using the [Working with Default Warehouse Locations \(WWDL\)](#) menu option.

When you receive merchandise into a pending warehouse, the system performs the following updates at receiving time:

- Creates a pending putaway detail record. If a pending putaway detail record already exists for the purchase order and item/SKU, the system adds the receipt quantity to the existing pending putaway detail record. The pending putaway detail record indicates:
 - The quantity of the item in the pending warehouse *for this receipt*. The on hand quantity for the item at the item warehouse level indicates the total pending putaway quantity for the item.
 - The “final destination” warehouse where the inventory will be placed.
 - The expected due date of the inventory; this due date is displayed in order entry, order maintenance, standard or streamlined order inquiry, inventory inquiry, and item availability for the “final destination” warehouse.
- Creates a PO layering record for the “final destination” warehouse.
- Decreases the on-order quantity for the item in the “final destination” warehouse.
- Creates an inventory transaction history record for the pending warehouse.

The following updates *do not occur* when merchandise is received into a pending warehouse.

- The on-hand quantity for the item in the “final destination” warehouse is not changed.
- The costing calculation is not performed.
- Vendor Item analysis is not performed

These updates occur when the merchandise is transferred from the pending putaway warehouse to the “final destination” warehouse.

See [Pending Putaway Overview](#) for an overview of the updates the system performs when you place inventory into a pending warehouse.

Receiving into a Staging Warehouse

When you receive into a staging warehouse, the same updates take place at receiving as when you receive into inventory. However, you normally define the staging warehouse to be non-allocatable and non-viewable in Order Entry, and define each location to be non-pickable; the result is that the inventory is not generally available or visible on the system until you place it in your main warehouse.

See Working with Default Warehouse Locations (WWDL) for an overview of defining default locations within a staging warehouse.

Suggest Warehouse/Location Placement

Purpose: Use the Suggest Location Placement function to have the system determine where merchandise should be placed. The system searches through the available locations in your warehouse to determine where you should place the merchandise. You can accept, reject or change any of the system suggested placements for an item.

When suggest placement is used: Suggest Location Placement can be used during the following functions:

- [Receiving Purchase Orders \(PORC\)](#): when merchandise is being received into inventory
- [Placing Suspended Stock \(SUSP\)](#): when merchandise is being transferred from suspense to inventory
- [Suggest Location Placement \(MSLO\)](#): when you are placing items in locations independent of the Purchase Order Receipts and Place Suspended Stock functions.

Standard Warehouse/Location Placement

Purpose: The system will attempt to place the merchandise in a single location where the item is currently stored, if possible. If a single location cannot be found, the system will spread the merchandise across as many locations where the item is stored as is necessary. If the full quantity cannot be placed in existing item locations, the system will search for any suitable location (e.g., a location class compatible with the item type, a location that is not frozen, etc.) that can hold the placement quantity.



Note:

The Suggest Location Placement function searches existing warehouse locations only; new warehouse locations will not be created using this function.

Your company decides the criteria for how locations are suggested and the order in which the system will search for available locations.

- [System Control Values](#)
- [Searching for Locations](#)
- [Determining Location Capacity](#)
 - [Determining Location Capacity by Units](#)
 - [Determining Location Capacity by Volume](#)

System Control Values

The following values in the System Control table allow you to define whether to use suggest placement, and how the system will search for available locations when recommending stock placements. The following values are used:

- Suggest Location Placement (A27), which controls whether the function is used.
- [Type of Location to Search First during Suggest Location Placement \(C40\)](#), which defines the location type that will be searched first.
- [Type of Location to Search Second during Suggest Location Placement \(C41\)](#), which defines the location type that will be searched second.
- [Type of Location to Search Third during Suggest Location Placement \(C42\)](#), which defines the location type that will be searched last.
- [Suggest Multiple Items in a Location during Suggest Location Placement \(C43\)](#), which determines whether the merchandise can be placed in a location that contains other merchandise when the system is searching for any available location.
- [Location Capacity Method \(A31\)](#), which determines how the system determines when a location is full.

Suggest Location Placement searches primary, secondary and bulk locations in the sequence you define. You do not have to include all three location types. For example, you can choose to suggest only primary locations, or only bulk and secondary locations for item placements. Temporary locations cannot be recommended for placements.

Searching for Locations

The Suggest Location Placement program searches for a location as follows:

1. First, search locations whose *Location type* code matches the Type of Location to Search First during Suggest Location Placement (C40) in location code sequence until it finds a single location for the placement; otherwise,
2. Search locations whose *Location type* code matches the Type of Location to Search Second during Suggest Location Placement (C41) until it finds a single location for the placement; otherwise,
3. Search locations whose *Location type* code matches the Type of Location to Search Third during Suggest Location Placement (C42) until it finds a single location for the placement; otherwise,
4. If the full quantity cannot be placed in one location, search through all applicable locations again, in the same sequence, and fill each eligible location to capacity until the full quantity has been placed; otherwise,
5. If the full quantity cannot be placed in the existing locations where the item is stored, search for any available location in the warehouse that can hold the full placement quantity. If the Suggest Multiple Items in a Location during Suggest Location Placement (C43) value is selected, the program places two different items in the same location if it can hold the full capacity; otherwise, if the value is unselected, the program evaluates only empty locations.

Determining Location Capacity

The system evaluates the location capacity when determining whether the placement quantity can fit in a location. The location capacity can be evaluated by units, by cubic volume, or by weight. The unit capacity, cubic capacity, and weight capacity for a location are defined in the Location table. See [Creating and Maintaining Locations \(WLOC\)](#).

Determining Location Capacity by Units

When determining capacity by units, the system evaluates the number of units currently on hand in the location against the placement quantity to determine if the quantity can fit in the location. The total quantity cannot exceed maximum number of units from the Item Location table or the Location table.

In addition, the system checks the combined item weight to ensure that the location can support the on-hand quantity and the proposed placement quantity.

Determining Location Capacity by Volume

When determining capacity by volume, the system evaluates the cubic volume of the units currently on hand in the location against the cubic volume of the placement quantity to determine if the quantity can fit in the location. The Fill factor defined for the location is used to determine the total cubic volume that can fit in the location. See [Creating and Maintaining Locations \(WLOC\)](#).

If item dimensions (height, length, and width) are defined in the Item/SKU table, the item dimensions will be used to calculate the cubic volume. If item dimensions are not defined, the *Cube factor* is used.

In addition, the system checks the combined item weight to ensure that the location can support the on-hand quantity and the proposed placement quantity.

Receiving Overages and Underages

Overages: At times, a vendor may overship an item. The [Over Receipt % \(A61\)](#) value in the System Control table allows you to receive more than the quantity ordered for an item if the quantity received is within the tolerance limit.

If a vendor ships you more merchandise than you ordered, the system allows you to record the receipt if the overage is within an acceptable tolerance limit. For example, if you set the Over Receipt % (A61) to 10%, you can receive a quantity up to ten percent above the amount that was ordered. If the overage exceeds the tolerance amount, the following message indicates:

```
Invalid over receipt quantity
```

The [Override Tolerance \(A18\)](#) value in the Security table lets you accept any overage amount the vendor may ship. When this option is allowed, the system accepts any receipt quantity you enter without displaying a message.

Underages: At times, a vendor may under-ship an item and may not be able to fulfill the entire purchase request. The [Under Receipt % \(A62\)](#) value in the System Control table allows the system to close a purchase order line if only a certain percentage of the order quantity is received.

If a vendor short-ships an item and the quantity received is within the defined tolerance, the purchase order line will be closed even if the full order quantity was not received. This allows you to close purchase order lines when vendors short-ship merchandise and are unable to complete the shipment.

For example, if you define the Under Receipt % (A62) at 10%, a purchase order line will be closed when at least 90% of the merchandise is received. If you order 100 units and receive 92 units, the line will be closed when the receipt for 92 units is accepted.

If the vendor ships you the balance of the merchandise at a later time, you can add a line to the purchase order during Purchase Order Receipts to record the additional receipt, if you have the proper authority. The [Add PO Detail Line during PO Receipts \(A21\)](#) value in the Security table determines whether you can add lines to a purchase order at receiving.

Managing Warehouses

Topics in this part: The following topics describe the functions available from the Warehouse Management menu. These functions are used to define your warehouses, establish warehouse locations and assign inventory, and analyze your current warehouse utilization.

- [Creating and Maintaining Warehouses \(WWHS\)](#) shows you how to establish each of your warehouses on the system. In addition, this topic explains how to define the warehouse sequence to use when you fulfill customer orders from more than one warehouse.
- [Creating and Maintaining Location Classes \(WLCL\)](#) explains how location classes can be used to define the type of merchandise that will be stored in a warehouse location.
- [Creating and Maintaining Locations \(WLOC\)](#) shows you how to define the locations in the warehouse where merchandise is stored. Warehouse locations can be comprised of a series of zone, aisle, shelf, and bin indicators, or they can be free-form user-defined location codes.
- [Using the Location Generator \(MLOC\)](#) explains how to use the automated location generator to create multiple warehouse locations at the same time.
- [Creating Item Warehouse/Locations \(MIWL\)](#) shows you how to assign an item to a warehouse location or change existing item location information, or change existing item warehouse information.
- [Suggest Location Placement \(MSLO\)](#) describes how to use the Suggest Warehouse Placement function to have the system determine the warehouse location where an item should be stored.
- [Creating and Maintaining Item Warehouses](#) describes how to assign items to a warehouses and how inventory history is captured for each item at the warehouse level.
- [Working with Default Warehouse Locations \(WWDL\)](#) describes how to create and work with the default locations the system checks automatically for certain inventory transactions.
- [Pending Putaway Overview](#) describes the updates the system performs when you place inventory into a pending putaway warehouse.

Creating and Maintaining Item Warehouses

Purpose: Work with Item Warehouses is used to change, delete, display, or create item warehouse records. An item warehouse record must exist for each item/SKU that is stocked in the warehouse. These records also provide the ability to capture inventory history for each item/SKU in the warehouse.

Item warehouse records are created automatically during item setup using the Work with Items function or the SKU Generator if you specify a warehouse for the item/SKU. Use the Work with Item Warehouse function to assign an item to a warehouse manually, if the item was not stocked in the warehouse at the time of setup.

In this topic:

- [Reset On-Order PO Quantity Periodic Function](#)
- [Inventory Extract Periodic Function](#)
- [Work with Item Warehouse Screen](#)
- [Create Item Warehouse Screen](#)

- [Display Item Warehouse Screen](#)
- [Work with Item Locations Screen](#)
- [Create Item Location Screen](#)
- [Change Item Location Screen](#)

Reset On-Order PO Quantity Periodic Function

You can use the PORST periodic function to reset the open PO quantities in the Item Warehouse table based on purchase order detail lines that are open or held, or received into suspense or into a pending putaway warehouse location.

Sample setup: Enter the following at the [Create Periodic Function Screen](#):

- Function: PORST
- Description: PO On Order Reset
- Company parameter: Y
- Appl area: ALL
- Program name: OER1018

Add to periodic process: You can, optionally, add this periodic function to a periodic process at the [Work with Periodic Processes Screen](#), select Functions.

You can also run the on-order reset through the [Unlock Purchase Order \(MUPO\)](#) menu option.

Inventory Extract Periodic Function

Use the Inventory Extract INVEXT periodic function (program name URR0003) to create records in the Inventory Extract table for each item location in your company. You can use the Inventory Extract table to determine the on-hand inventory for each item/SKU in your company.

No on-hand quantity: If all of the item locations for an item/SKU have an on-hand quantity equal to or less than zero, the system creates only 1 record in the Inventory Extract table for the item/SKU. This 1 record indicates that the item/SKU does not have any on-hand inventory.

- The location for this inventory extract record is the primary primary location for the item.
- If a primary primary location has not been defined for the item, the location for this inventory extract record is blank.



Note:

The “primary primary” location is stored in the [Primary location](#) field in the SKU table.

Records remain in the Inventory Extract table until they are downloaded to another system. It is your responsibility to delete the records in the Inventory Extract table. Each time you run the On-Hand by Location Extract program, the system appends records to this table; because of this, duplicate records may exist in the table.

Work with Item Warehouse Screen

Purpose: Use this screen to create, change, delete, or display records that define the items that are stocked in the warehouse. An item/warehouse record must exist for each item/SKU in the warehouse.

How to display this screen:

- Select Items for the desired warehouse at the [Work with Warehouses Screen](#).
- Select Warehouse for the item at the [Work with Items Screen](#).

Field	Description
Item	The number of the item assigned to the warehouse. <i>Alphanumeric, 12 positions; optional.</i>
SKU	The Split SKU codes associated with the item. The three elements (color, size, and width) are used to further identify the item.
 Note: The SKU elements are defined in the System Control table.	
On-hand	<i>Alphanumeric, three 4-position fields; optional.</i> The number of units of this item across all locations in the warehouse. <i>Numeric, 7 positions; optional.</i>
On order	The total quantity of this item in this warehouse that is due to be received through purchase orders. <i>Numeric, 7 positions; optional.</i>
Protected	An amount of inventory that cannot be reserved using immediate or batch reservation for this item or SKU across all locations in this warehouse. <i>Numeric, 7 positions; optional.</i>
Reservation freeze	Indicates whether the item or SKU in this warehouse is on hold, or frozen. Valid values are: • Selected = The item/SKU warehouse is frozen. • Unselected = The item/SKU warehouse is not frozen. If an item or SKU warehouse is frozen: • Pick Slip Generation ignores the item warehouse when determining where inventory should be picked to fulfill an order. See Performing Pick Slip Generation. • Inventory does not reserve during Order Entry. See Reviewing Reservation Types.

Screen Option	Procedure
Create an item warehouse record	Select Create to advance to the Create Item Warehouse Screen .
Change item warehouse information	Select Change for an Item Warehouse record to advance to the Change Item Warehouse Screen. See the Create Item Warehouse Screen for field descriptions.

Screen Option	Procedure
Delete item warehouse information	Select Delete for an Item Warehouse to delete it.
	 Note: You cannot delete an item warehouse record if there are any on-hand quantities, open purchase order quantities, or backordered or reserved quantities for the item in the selected warehouse. If there are any Item Location records or Item Warehouse History records associated with this item and warehouse, the system will display a warning message: Deleting this warehouse will also delete any dependent records.
Display item warehouse information	Select Display for an Item Warehouse record to advance to the Display Item Warehouse Screen .
Work with locations	Select Locations for an Item Warehouse record to advance to the Work with Item Locations Screen .
Display Pending Put away Details	Select Pend Putaway for an Item Warehouse record to advance to the Display Pending Putaway Details Screen .

Create Item Warehouse Screen

Purpose: Use this screen to create an item warehouse.

The Work with Items function and the SKU generator automatically create Item Warehouse records if you enter a warehouse code, and Item Location records if you enter a location code during item setup. See [Creating Item Warehouse/Locations \(MIWL\)](#).

How to display this screen: At the initial [Work with Item Warehouse Screen](#), select Create.

Field	Description
Item	The item number you are assigning to the warehouse. The item number is validated against the Item/SKU table. <i>Alphanumeric, 12 positions.</i> <i>Create screen: required.</i> <i>Change screen: display-only.</i>

Field	Description
Colo/Styl/Size	The Split SKU codes associated with the item. The three elements (color, style, and size) are used to further identify the item. The SKU codes entered are validated against the SKU tables.  Note: The SKU elements are defined in the System Control Table. <i>Alphanumeric, three 4-position fields.</i> <i>Create screen: required, if applicable.</i> <i>Change screen: display-only.</i>
Reservation freeze	Indicates whether the item or SKU in this warehouse is on hold, or frozen. Valid values are: - Selected = The item/SKU warehouse is frozen. - Unselected = The item/SKU warehouse is not frozen. If an item or SKU warehouse is frozen: - Pick Slip Generation will ignore the item warehouse when determining where inventory should be picked to fulfill an order. See Performing Pick Slip Generation. - Inventory will not reserve during Order Entry. See Reviewing Reservation Types.
Protected qty	An amount of inventory that cannot be reserved (using immediate or batch reservation) for this item/ SKU across all locations in this warehouse. The system will only use this inventory in Interactive Reservation. <i>Numeric, 7 positions; optional.</i>
Min qty	The least amount of inventory on hand for this item/ SKU. An error message indicates if you try to enter a minimum quantity and you do not have authority to the Maintain Item Warehouse Minimum/Maximum Quantity (A92) secured feature: Not authorized to change. <i>Numeric, 7 positions; optional.</i>
Protect min/max (Protect minimum and maximum quantities)	This field is not currently implemented. This field is included only if the Use Store File (G15) system control value is selected. An error message indicates if you try to change this value and you do not have authority to the Maintain Item Warehouse Minimum/Maximum Quantity (A92) secured feature: Not authorized to change.
Max qty	The maximum amount of inventory on hand for this item/SKU. An error message indicates if you try to enter a maximum quantity and you do not have authority to the Maintain Item Warehouse Minimum/Maximum Quantity (A92) secured feature: Not authorized to change. <i>Numeric, 7 positions; optional.</i>

Field	Description
Economic order qty	The recommended optimum ordering quantity for this item/SKU, based on a set of criteria such as cost. Used for inventory reporting purposes. <i>Numeric, 7 positions; optional.</i>
Reorder qty	Defines the quantity of this item/ SKU that should be ordered when the item/ SKU reaches the minimum stock level. <i>Numeric, 7 positions; optional.</i>
Original retail price	The original price of this item in the retail store. You can use this field to track the original retail price for the item if the warehouse represents a retail store. This field is included only if the Use Store File (G15) system control value is selected. An error message indicates if you try to enter a price and you do not have authority to the Maintain Item Warehouse Retail Price (A91) secured feature: Not authorized to change. <i>Numeric, 13 positions with a 2-place decimal; optional.</i>
Protect price (Protect current price)	This field is not currently implemented. This field is included only if the Use Store File (G15) system control value is selected. An error message indicates if you try to change this value and you do not have authority to the Maintain Item Warehouse Retail Price (A91) secured feature: Not authorized to change.
Current retail price	The current price of this item in the retail store. You can use this field to track the current retail price for the item if the warehouse represents a retail store. This field is included only if the Use Store File (G15) system control value is selected. An error message indicates if you try to enter a price and you do not have authority to the Maintain Item Warehouse Retail Price (A91) secured feature: Not authorized to change. <i>Numeric, 13 positions with a 2-place decimal; optional.</i>
User field 1	An informational field where you can enter additional item warehouse information. <i>Alphanumeric, 10 positions; optional.</i>
User field 2	An informational field where you can enter additional item warehouse information. <i>Alphanumeric, 10 positions; optional.</i>

Display Item Warehouse Screen

To display: Select Display for an item warehouse at the [Work with Item Warehouse Screen](#) to advance to the Display Item Warehouse screen. You cannot change any fields on this screen.

Field	Description
Item	The item number assigned to the warehouse. <i>Alphanumeric, 12 positions.</i>

Field	Description
SKU	The SKU associated with the item. <i>Alphanumeric, three 4-position fields.</i>
Warehouse	The code and description of the warehouse where the item is located. <i>Code: Numeric, 3 positions.</i> <i>Description: Alphanumeric, 30 positions.</i>
Reservation freeze	Indicates whether the item or SKU in the warehouse is on hold, or frozen. Valid values are: • Selected = The item/SKU warehouse is frozen. • Unselected = The item/SKU warehouse is not frozen. If an item or SKU warehouse is frozen: • Pick Slip Generation will ignore the item warehouse when determining where inventory should be picked to fulfill an order. See Performing Pick Slip Generation. • Inventory will not reserve during Order Entry. See Reviewing Reservation Types.
Economic order qty	The recommended optimum ordering quantity for this item/SKU, based on a set of criteria such as cost. Used for inventory reporting purposes. <i>Numeric, 7 positions.</i>
Backorder qty	The quantity of the item/SKU in this warehouse that is currently on open orders but not available in your warehouse. <i>Numeric, 7 positions.</i>
Protected qty	The amount of inventory that cannot be reserved (using immediate or batch reservation) for this item/ SKU across all locations in this warehouse. The system will only use this inventory in Interactive Reservation. <i>Numeric, 7 positions.</i>
Min qty	The least amount of inventory on hand for this item/ SKU. <i>Numeric, 7 positions.</i>
Max qty	The maximum amount of inventory on hand for this item/SKU. <i>Numeric, 7 positions.</i>
Reorder qty	Defines the quantity of this item/SKU that should be ordered when the item/ SKU reaches the minimum stock level. <i>Numeric, 7 positions.</i>
Reserve quantity	The quantity of this item/SKU in this warehouse that is reserved for existing orders. This total increases through immediate, batch, and interactive reservation, and decreases through confirmation or pick void/reprint. <i>Numeric, 7 positions.</i>
On hand quantity	The number of units of this item in all locations in this warehouse. <i>Numeric, 7 positions.</i>

Field	Description
On order quantity	The total quantity of this item in this warehouse that is due to be received on open purchase orders. This quantity increases when you enter a purchase order and decreases when you receive a purchase order. If you receive purchase orders into suspense, the suspended quantity remains in this total until you place the suspended stock. <i>Numeric, 7 positions.</i>
S/H reserve qty	The quantity of this item/SKU in this warehouse that is reserved for existing orders and requires special handling. This total increases through immediate, batch, and interactive reservation, and decreases through confirmation or pick void/reprint. <i>Numeric, 7 positions.</i>
Reserve transfer qty	The quantity of this item/SKU in this warehouse that is set to be transferred to another warehouse through replenishment. <i>Numeric, 7 positions.</i>
Protect min/max	This field is not currently implemented. This field is included only if the Use Store File (G15) system control value is selected.
Cost of goods	The total cost of units shipped from this warehouse, based on the defined unit cost of the item or SKU.

 Note:

The [Display Cost in Inventory \(A38\)](#) secured feature controls the display of this field.

Picks generated	<i>Numeric, 13 positions with a four-place decimal.</i> This field is not currently implemented.
Dollars returned	The total dollar value of units returned to this warehouse, based on the actual selling price of each unit. <i>Numeric, 20 positions with a 2-place decimal.</i>
Units returned	The total number of units returned to this warehouse by customers. <i>Numeric, 9 positions.</i>
Dollars sold	The total dollar value of units shipped and billed from this warehouse, based on the actual selling price of each unit. <i>Numeric, 20 positions with a 2-place decimal.</i>
Units sold	The total number of units shipped and billed from this warehouse. <i>Numeric, 9 positions.</i>
Original retail price	The original price of this item in the retail store. You can use this field to track the original retail price for the item if the warehouse represents a retail store. This field is included only if the Use Store File (G15) system control value is selected. <i>Numeric, 13 positions with a 2-place decimal.</i>

Field	Description
Current retail price	The current price of this item in the retail store. You can use this field to track the current retail price for the item if the warehouse represents a retail store. This field is included only if the Use Store File (G15) system control value is selected. <i>Numeric, 13 positions with a 2-place decimal.</i>
Protect price	This field is not currently implemented. This field is included only if the Use Store File (G15) system control value is selected.
User field 1	An informational field where you can enter additional item warehouse information. <i>Alphanumeric, 10 positions.</i>
User field 2	An informational field where you can enter additional item warehouse information. <i>Alphanumeric, 10 positions.</i>

Work with Item Locations Screen

Purpose: Use this screen to create, change, delete, or display a location for an item/SKU within a warehouse. Essential user-defined and system-updated quantity information is kept at the item/SKU location level.

How to display this screen: At the [Work with Item Warehouse Screen](#), select Locations for an item warehouse.

Field	Description
Location	A code that identifies a location for an item/SKU within the warehouse. <i>Numeric, 7 positions; optional.</i>
On-hand	The number of units for this item in this location. <i>Numeric, 7 positions; optional.</i>
Pending	The quantity of an item for which a batch inventory transaction has been entered, but not processed. A negative quantity in this field indicates component items picked from this location for a finished good work order. This field is cleared once you process the work order. See Finished Good Work Order Processing (WWOR) . <i>Numeric, 7 positions; optional.</i>
Min	The least amount of units to stock in this location. <i>Numeric, 7 positions; optional.</i>
Max	The maximum amount of units to stock in this location. <i>Numeric, 7 positions; optional.</i>

Field	Description
Reservation freeze	Indicates whether the item location or SKU location is frozen. Valid values are: • Selected = The item/SKU location is frozen. • Unselected = The item/SKU location is not frozen.

 Note:

Even though a pick slip does not print for an item from a frozen item location, the system still reserves the item on the [Order Lines Fields](#) in Order Entry.

Screen Option	Procedure
Create an item location	Select Create to advance to the Create Item Location Screen .
Change an item location	Select Change for an item location to advance to the Change Item Location Screen .
Delete an item location	Select Delete for an item location to delete it.

 Note:

The system will prevent you from deleting Item Locations if the quantity on-hand for the item in this location is greater than zero, or if there are any pending Inventory Transactions for the item in this location.

Display an item location	Select Display for an item location to advance to the Display Item Location Screen. You cannot change any information at this screen. See the Change Item Location Screen for field descriptions.

Create Item Location Screen

Purpose: Use this screen to create an item location.

Temporary location: If the item is assigned to a temporary location, the system automatically deletes the location when the on-hand quantity reaches zero. Order Administration does not allocate merchandise from a temporary location even if the location is defined as pickable. In order to allocate stock, you must move the merchandise to a non-temporary, pickable location.

How to display this screen:

- Select Create at the [Work with Item Locations Screen](#).
- Select Create Loc at the [Work with Inventory Transactions Screen](#).

Field	Description
Location	The code representing the area within the warehouse that contains the item or SKU. An error message indicates if you enter a location whose location class does not match the location class for the item and the Allow Location Class Edit in Inventory Transaction (F86) system control value is selected: Item is not compatible with Location. Typically the location code is composed of a single alphanumeric character for Zone, and two numbers each for Aisle, Shelf, and Bin. For instance, the location A010201 indicates: <pre>Zone Aisle Shelf Bin A 01 02 01</pre> Free-form location codes can also be used. The location code entered is validated against the Location table. <i>Alphanumeric, 7 positions; required.</i>
Reservation freeze	Indicates whether the item location or SKU location is frozen. Valid values are: - Selected = The item/SKU location is frozen. - Unselected= The item/SKU location is not frozen.
Min qty	The desired least amount of inventory on hand for this item/SKU in this warehouse location. <i>Numeric, 7 positions; optional.</i>
Max qty	The desired highest amount of inventory on hand for this item or SKU in this warehouse location. <i>Numeric, 7 positions; optional.</i>

 Note:

Even though a pick slip does not print for an item from a frozen item location, the system still reserves the item on the [Order Lines Fields](#) in Order Entry.

Change Item Location Screen

Purpose: Use this screen to change the item location's reservation freeze status, minimum quantity and maximum quantity, and to view inventory transaction information.

How to display this screen: Select Change for an item location at the [Work with Item Locations Screen](#).

See the [Create Item Location Screen](#) for the field descriptions not shown below.

Field	Description
On-hand quantity	The number of units of the item in this location. <i>Alphanumeric, 7 position; display-only.</i>

Field	Description
Pending transfer quantity	The quantity of an item for which an inventory transaction has been entered, but not processed. A positive quantity reflects that inventory is in the process of being transferred to this location while a negative quantity indicates inventory is in the process of being transferred <i>from</i> this location. Reflects an adjustment, transfer, or finished good work order, and is not included in the on-hand quantity. <i>Numeric, 7 positions; display-only.</i>
Printed quantity	The number of units currently “allocated” for the item in this location, determined by the total quantity of the item on printed pick slips. When determining the locations from which to reserve items during pick slip generation, the printed quantity is subtracted from the on-hand quantity in the location to determine the quantity available for reservation. <i>Numeric, 7 positions; display-only.</i>
Placement date	The date when you first placed the item in this location, for example through purchase order receiving, customer returns, transfers, or adjustments. <i>Numeric, 6 positions (user date format); display-only.</i>
Item transfer pending	Indicates whether an inventory transaction is pending for the item in this location. For example, the system selects this field if you enter a finished good work order, but do not approve or process the request. See Finished Good Work Order Processing (WWOR).

Pending Putaway Overview

Purpose: A pending putaway warehouse is a warehouse where you keep stock that still needs to be moved to its final destination: for example, a staging area.

Use a *pending putaway* warehouse to temporarily store saleable inventory on its way to its final destination warehouse. Inventory received into a *pending putaway* warehouse is included in the on-hand quantity for that warehouse, but also retains its on-order status; the inventory is also visible in PO Layering. Stock moved into or out of a pending putaway warehouse increases or decreases the on-order quantity in the pending putaway item warehouse.

How do I create a pending warehouse? You can define a warehouse as a pending putaway warehouse using the [Working with Default Warehouse Locations \(WWDL\)](#) menu option.



Note:

Inventory in a pending putaway warehouse should not be available for reservation and picking. You should leave the *Allocatable flag* for the warehouse unselected.

In this topic:

- [Pending Putaway Processing](#)
 - [Purchase Order Receipt Transactions](#)
 - [Warehouse Transfer Transactions](#)

- Positive Inventory Adjustments Transactions
- Negative Inventory Adjustments Transactions
- Display Pending Putaway Details Screen

Pending Putaway Processing

Purpose: When you place stock into a *pending putaway* warehouse, the system performs the following steps.

1. Creates a record in the Pending Putaway Detail table. You can review inventory in a pending putaway warehouse on the [Display Pending Putaway Details Screen](#).

The pending putaway detail record indicates:

- *PO #* = The purchase order number on which the inventory was originally received. If the inventory is not associated with a purchase order, the system uses 9999999 as the purchase order number.
 - *PO detail* = The purchase order line number on the purchase order on which the inventory was originally received. If the inventory is not associated with a purchase order, this field remains blank.
 - *PO warehouse* = The “final destination” warehouse where the inventory will be placed.
 - *Due date* = The expected due date of the inventory; this due date will display in order entry, order maintenance, order inquiry, inventory inquiry, and item availability for the “final destination” warehouse.
 - *Pending qty* = The quantity of the item in the *pending putaway* warehouse for this transaction. The on hand quantity and on order quantity for the item at the item warehouse level indicates the total pending quantity for the item.
 - *Offer* = The offer associated with the pending putaway detail record. If the inventory is associated with a purchase order, this is the offer on the purchase order.
2. For inventory placed in a *pending putaway* warehouse, the system creates a PO layering record for the “final destination” warehouse. The *Open quantity* field represents the quantity placed in pending putaway for the transaction.
 3. Decreases the on order quantity for the item in the “final destination” warehouse.
 4. Creates an inventory transaction history record for the pending warehouse.

Determining the “final destination” warehouse: The “final destination” warehouse is the warehouse where the inventory will eventually be placed. The system determines which warehouse is the “final destination” warehouse by looking at:

- the warehouse on the purchase order, *or*
- the warehouse associated with the inventory transaction, *or*
- the *Primary warehouse* for the item/SKU.

Moving stock from a pending warehouse: When you move stock from a pending warehouse, the system performs the following steps.

1. Decreases the quantity of the item in the pending warehouse. If the inventory quantity associated with the pending putaway detail record reaches zero, the system also deletes the pending putaway detail record.
2. Increases the on hand quantity of the item in the “final destination” warehouse.
3. Creates an inventory transaction history record for the pending warehouse and the “final destination” warehouse.

4. Performs vendor item analysis.

Other Async Processing: The Other Async performs updates to inventory placed in a pending warehouse.

- If a pending putaway detail record associated with a purchase order exists, the system keeps the associated PO layering record in an open status until the pending putaway detail record is deleted. The system deletes pending putaway detail records when the associated pending quantity is moved to another warehouse.

In addition, for inventory placed in a *pending putaway* warehouse:

- If enough backorders exist to use up the pending quantity, the system updates the status of the PO layering record to closed.
- If the pending quantity is less than the open quantity on the PO layering record, the system updates the PO layering open quantity to equal the pending quantity.
- If the pending quantity is equal to or greater than the open quantity on the PO layering record, the system does not update the PO layering open quantity.

Print backorder reports (PBOR): The on order quantity on the backorder reports does not include the quantity in a pending putaway warehouse.

Soldout control processing: The calculation the system uses to determine when an item with a soldout control status of 2 should be sold out now includes the on order quantity for pending putaway detail records that are associated with a *pending putaway* warehouse and whose “final destination” warehouse is allocatable. An item with a soldout control status of 2 is sold out when this condition is met:

`(on order + on order in pending putaway warehouse + on-hand) - reserved < 0`

Reset On-Order PO Quantity periodic function: The Reset On-Order PO Quantity periodic function updates the on order quantity in a pending putaway warehouse, regardless if the “final destination” warehouse is allocatable or non-allocatable.

Purchase Order Receipt Transactions

When you receive inventory into a pending warehouse through [Purchase Order Receipts](#), the system looks for an existing pending putaway detail record for this purchase order and item/SKU (indicating the item/SKU on this purchase order has already been partially received).

- If a pending putaway detail record does not already exist for the purchase order and item/SKU, the system creates a pending putaway detail record in the pending warehouse.
- If a pending putaway detail record already exists for the purchase order and item/SKU, the system adds the receipt quantity to the existing pending putaway detail record. The system looks at these fields in the Pending Putaway Detail table to determine if a record already exists for this purchase order and item/SKU:
 - Company: the company where you performed the PO receipt.
 - Item number: the item you received into the pending putaway warehouse.
 - SKU code: the SKU of the item.
 - Warehouse: the pending putaway warehouse.
 - PO #: the number of the purchase order associated with the item you received.
 - Sequence #: the system uses the next available number.
 - PO layering warehouse: the “final destination” warehouse; this is the warehouse on the purchase order line.

PO Maintenance: If you cancel a purchase order line after it has been partially received in a pending warehouse, the system keeps the pending putaway detail record until the inventory in the pending warehouse is placed in its “final destination” warehouse.

Warehouse Transfer Transactions

For a warehouse transfer (T) from one pending warehouse to another pending warehouse, the system:

For the “from” warehouse:

- decreases the on order quantity and the on hand quantity on the item warehouse for the “from” warehouse. If the on order quantity and on hand quantity is adjusted to a negative quantity, the quantities are set to 0.
- decreases the pending quantity on the pending putaway detail record with the oldest due date for the “from” warehouse.
 - pending quantity - transfer quantity = new pending quantity.
 - If the pending quantity for the record is reduced to 0, the record is deleted.

For the “to” warehouse:

- increases the on order quantity and the on hand quantity on the item warehouse for the “to” warehouse.
- checks for existing pending putaway detail records in the “to” warehouse from the same item, SKU, PO number, and PO detail sequence number found in the “from” warehouse pending putaway detail record.
 - if a pending putaway detail record is found, then the system increases the pending quantity with the transfer quantity. Pending quantity + transfer quantity = new pending putaway quantity.
 - if a pending putaway detail record does not exist, then the system creates a pending putaway detail record, using the information from the “from” pending putaway detail record. In this case, the pending quantity represents the transfer quantity.
- The system does not adjust PO layering since the PO layering record does not contain the pending putaway warehouse.

Positive Inventory Adjustments Transactions

The system:

- increases the on order quantity and on hand quantity on the item warehouse by the adjustment quantity.
- creates a pending putaway detail record in the pending warehouse. If a pending putaway detail record already exists for the same transaction date and PO # 9999999, the system adds the adjustment quantity to the pending quantity of the existing pending putaway detail record.
 - Item number: the item against which you performed the adjustment.
 - SKU code: the SKU of the item.
 - Warehouse: this is the pending putaway warehouse.
 - PO #: when a pending putaway quantity is not associated with a purchase order, the system displays 9999999.
 - PO detail sequence #: the system assigns the next available number.
 - PO warehouse: this is the “final destination” warehouse.

- Due date: the system uses this calculation to determine the due date:

$$\text{date the inventory adjustment was performed} + \text{number in the Pending Putaway Due Date Days system control value} = \text{due date}$$
- Pending quantity: the adjustment quantity.
- creates a PO layering record. If a PO layering record exists, the system adds the adjustment quantity to the open quantity on the PO layering record.
 - Company: the company where you performed the adjustment.
 - Item number: the item against which you performed the adjustment.
 - SKU code: the SKU of the item.
 - Warehouse: the “final destination” warehouse.
 - PO #: 9999999
 - Sequence #: the sequence number for the pending putaway detail record.
 - Due date: the due date for the pending putaway detail record.
 - Open quantity: the adjustment quantity.



Note:

When you process an overlay transaction, the system uses the difference between the original on hand quantity and the overlay quantity as the adjustment quantity.

Negative Inventory Adjustments Transactions

The system:

- decreases the on order quantity and on hand quantity on the item warehouse by the adjustment quantity.
- decreases the pending quantity on the pending putaway detail record that has the oldest due date.

$$\text{pending putaway quantity} - \text{adjustment quantity} = \text{new pending putaway quantity}$$
- updates the PO layering record associated with the pending putaway detail record whose pending quantity was decreased.
 - Open quantity: reduced by the adjustment quantity. If the open quantity reaches 0, the system updates the PO layering status to closed.



Note:

When you process an overlay transaction, the system uses the difference between the original on hand quantity and the overlay quantity as the adjustment quantity.

Display Pending Putaway Details Screen

Purpose: Use this screen to review inventory information for items that have been placed in a pending putaway (PP) warehouse.

How to display this screen: At the [Work with Item Warehouse Screen](#), when accessed through the [Creating and Maintaining Item Warehouses](#) menu option, select Pend Putaway for an item warehouse.

Field	Description
Item	The code and description for the item that has inventory in a pending putaway warehouse. <i>Item code: Alphanumeric, 12 positions; display-only.</i> <i>Item description: Alphanumeric, 120 positions; display-only.</i>
SKU	The code and description for the unique attributes of the item that has inventory in a pending putaway warehouse. <i>SKU code: Alphanumeric, three 4-position fields; display-only.</i>
Warehouse	A code and description for the warehouse that represents the pending putaway warehouse. Pending warehouses are areas where you place inventory before the inventory is placed in its final destination, such as a staging area. <i>Warehouse code: Numeric, 3 positions; display-only.</i> <i>Warehouse description: Alphanumeric, 30 positions; display-only.</i>
PO #	The number of the purchase order associated with the inventory that has been placed in a pending putaway warehouse. If the inventory is not associated with a purchase order, for example the inventory is associated with an inventory transaction, the purchase order # is shown as 9999999. <i>Numeric, 7 positions; display-only.</i>
PO dtl (PO detail line number)	The purchase order line number associated with the inventory that has been placed in a pending putaway warehouse. If the inventory is not associated with a purchase order, for example the inventory is associated with an inventory transaction, the purchase order line number is the next available purchase order detail sequence number from the Pending Putaway Detail table. <i>Numeric, 3 positions; display-only.</i>
PO warehouse	The code for the warehouse where the inventory that is located in the pending putaway warehouse will finally be placed. • This is the warehouse on the purchase order. • If the inventory is not associated with a purchase order, this is the warehouse associated with the inventory transaction. • If the inventory transaction is not associated with a warehouse; this is the <i>Primary warehouse</i> for the item. <i>Numeric, 3 positions; display-only.</i>

Field	Description
Due date (Pending putaway due date)	The date inventory in the pending putaway warehouse is due to be received into the “final destination” warehouse. The purchase order has already been received in the pending putaway warehouse, but the system retains this information until the inventory is placed in the <i>PO warehouse</i>. Determining the pending putaway due date when a PO is not associated with the inventory If the inventory is not associated with a purchase order, such as when you perform an inventory transaction, the system determines the due date based on the Pending Putaway Due Date Days (G92). date of inventory transaction + number in SCV G92 = pending putaway due date days. Example: You perform an inventory adjustment for item A123 in the pending putaway warehouse on 6/20. The <i>Pending Putaway Due Date Days</i> system control value is 6. $6/20 + 6 = 6/26$ (pending putaway due date) <i>Numeric, 6 positions (user date format); display-only.</i>
Pending qty	The quantity of the item that is currently placed in the pending putaway warehouse for a specific transaction. This is the quantity to place in the <i>PO warehouse</i>. <i>Numeric, 7 positions; display-only.</i>
Offer	The offer on the purchase order, if any. <i>Alphanumeric, 3 positions; display-only.</i>

Docking Purchase Orders

Topics in this part: The following topics describe the functions available when using the Dock Purchase Orders function.

- [Docking Purchase Orders \(MDPO\)](#) shows you how to record a purchase order as “docked” before you receive it.
- [Printing the Purchase Orders in Docked Status Report \(PDPO\)](#) shows you how to print the Docked Purchase Order Report and describes the information on the report.
- [Printing the Docked but Past Due Purchase Order Report \(PDPD\)](#) shows you how to create and print the Past Due Docked Purchase Order Report and describes the information on the report.

Warehouse Management Integration

In this part: This part includes the following topics:

- [Warehouse Management System Integration Overview](#): Provides an overview of the Warehouse Management Integration.
- *Generic Outbound Purchase Order API*: Describes how to send purchase order information to an external system.
- *Purchase Order Receipt In API*: Describes how to process PO receipts received through the generic API.

- *Generic Pick In API (Shipments, Voids, and Backorders)*: Describes how to confirm shipments or void pick slips through the generic API.

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

Warehouse Management System Integration Overview

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

The Warehouse Management System integration allows Order Administration and a warehouse management system (WMS) to pass inventory information in order to keep inventory information in both systems accurate. The WMS is where the actual inventory is located, but Order Administration needs to keep track of the changes to inventory that occur in the WMS so that the data in Order Administration remains accurate. For example, if the WMS adjusts the inventory for an item and does not notify Order Administration, orders placed in Order Administration may reserve items that do not have enough inventory in the warehouse.

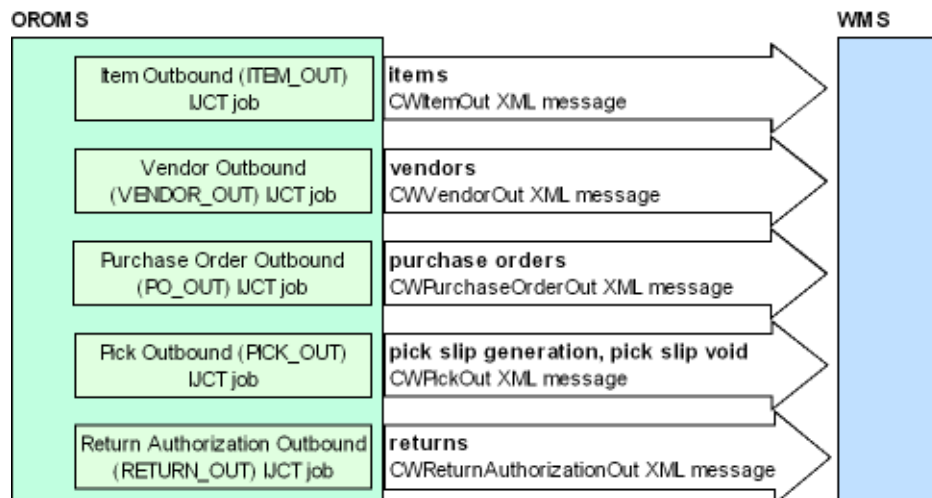
The warehouse management system integration creates a bridge between Order Administration and a WMS. This bridge allows Order Administration and a WMS to pass data between the two systems using XML messages transmitted via a queue or web service.

In this topic:

- [What Does Order Administration Send to the Warehouse Management System?](#)
- [What Does the Warehouse Management System Send to Order Administration?](#)
- [Warehouse Integration Summary](#)

What Does Order Administration Send to the Warehouse Management System?

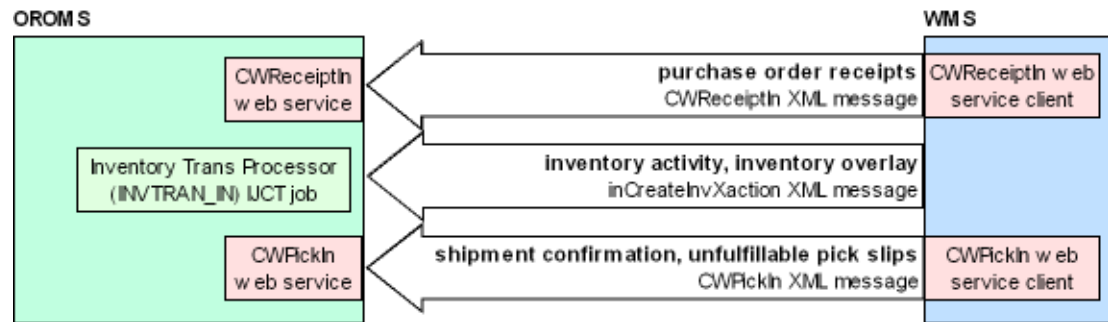
Order Administration controls item information, vendor information, purchase order information, pick slip information, and return information. Any time you create or modify information in these areas, Order Administration sends the information to the warehouse management system.



What Does the Warehouse Management System Send to Order Administration?

The warehouse management system controls changes to inventory, such as purchase order receipts, inventory transactions, and shipping merchandise to customers. Any time the

warehouse management system adds or removes inventory in a warehouse, the WMS sends the information to Order Administration.



Warehouse Integration Summary

Function	Performed By:
Items: Order Administration sends new or changed items to the warehouse management system (WMS)	<i>Generic Item Download API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Vendors: Order Administration sends new or changed vendors to the WMS	<i>Generic Vendor Download API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Purchase orders: Order Administration sends new or changed purchase orders to the WMS	<i>Generic Outbound Purchase Order API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Purchase order receipts: Order Administration receives information on purchase order receipts sent from the WMS	<i>Purchase Order Receipt In API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Inventory activity: Order Administration receives information on inventory activity, such as transfers or adjustments, from the WMS	<i>Generic Inventory Transaction Upload</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Inventory overlay: Order Administration receives updated inventory information from the WMS	<i>Generic Inventory Transaction Upload</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Pick slip generation: Order Administration sends information on generated pick slips to the WMS	<i>Generic Pick Out API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Pick slip void: Order Administration sends information on voided pick slips to the WMS	<i>Generic Pick Out API</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Function	Performed By:
Shipment confirmation: Order Administration receives information on full or partial shipments; information on carton contents can also be included	<i>Generic Pick In API (Shipments, Voids, and Backorders)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Unfulfillable pick slips: Order Administration receives information on pick slip voids from the WMS	<i>Generic Pick In API (Shipments, Voids, and Backorders)</i> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Returns: Order Administration sends updates on customer returns to the WMS	NA

Receiving Purchase Orders (PORC)

Purpose: Use the Purchase Order Receiving function to update the system when you receive inventory from open purchase orders from your vendors. When you receive inventory, you can:

- receive the entire purchase order in one step, or you can receive the items one line at a time.
- receive items directly into your on-hand inventory, or into suspense for placement at a later time.
- place items in more than one location or warehouse.
- have the system suggest where to place the items.
- add items to the purchase order if the vendor shipped you merchandise you did not order. This addition allows you to record the receipt for tracking purposes, and process a return-to-vendor transaction on the system at a later time.

If you are receiving a serial numbered item, you will need to enter the serial number of each unit at the time you place the merchandise in the warehouse. See [Enter Serial Numbers Screen](#).

If you are receiving a drop ship purchase order, you can also print a drop ship invoice if the [Print Drop Ship Invoice at time of Purchase Order Receiving \(F10\)](#) system control value is selected.



Note:

You should not confirm shipment through this menu option of a drop ship purchase order processed automatically through the [Order Orchestration Drop Ship Integration](#). This updates the status of the purchase order in Order Administration to X (Closed) but does not affect the Order Orchestration status of a purchase order. The item is still displayed on your Order Orchestration Vendor Portal screens, and your Order Orchestration functionality is not affected; however, vendor actions subsequent to receiving the purchase order are not recorded in Order Administration.

Purchase Order Receipt In API: You can use the Purchase Order Receipt In API to process PO receipts received from another system, such as a warehouse management system. See

the *Purchase Order Receipt In API* in the Order Administration Web Services Guide on [My Oracle Support](#) (ID 2953017.1) for an overview and the required setup.

PO download triggers: The setting of the [Create Generic PO Download Trigger for PO Receipt \(K27\)](#) system control value determines whether the system creates a purchase order download (POH) trigger when a purchase order line is received. See *Generic Outbound Purchase Order API* for an overview.

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

In this topic:

- [Work with P/O Receipt Detail Screen](#)
- [Receiving Methods](#)
- [Using the Direct Entry Method](#)
- [Using the Receive Option Method](#)
- [Using the Change Purchase Order Details Method](#)
 - [P/O Receipt Detail Screen](#)
- [Receiving an Entire Purchase Order into Inventory](#)
- [Receiving an Entire Purchase Order Into Suspense](#)
- [Changing the Exchange Rate](#)
- [Receiving Overages and Underages](#)
 - [PO Receiving Overage Warning Window](#)
- [Enter Serial Numbers Screen](#)
- [Display Current Receipts Screen](#)
- [Work with PO Receipt Locations Screen](#)
- [Creating Temporary Locations at Receiving](#)
 - [Select Location Screen](#)
- [Create Temporary Location Screen](#)
- [Create PO Detail Standard Screen \(Adding Lines To A Purchase Order\)](#)
- [Printing Purchase Order Labels](#)
 - [Print Labels Window](#)
- [Display Prior P/O Receipts Screen](#)
- [Display P/O Receipts Screen](#)
- [Work with PO Messages Screen](#)

Work with P/O Receipt Detail Screen

Purpose: This screen displays each open line on the purchase order you have selected and is used to enter the receipt information for the purchase order or to view information from prior receipts against the purchase order for lines that are still open.

From this screen you can also advance to the following functions: add lines to the purchase order, work with additional PO charges, work with PO messages, and work with vendor notes.

How to display this screen: Enter a purchase order number on the [Select P/O For Receipt Screen](#) or select a purchase order from the Select P/O To Receive screen.

Field	Description
Ln# (Line number)	The purchase order line number. There can be up to 999 lines on one purchase order; if you try to enter more than 999 lines on a purchase order, the system displays an error message: PO cannot exceed 999 lines.  Note: It is necessary to Clear the entry in the Ln # field, if any, so that the field is blank, before you accept your entries in purchase order receiving.
Item	<i>Numeric, 3 positions; optional.</i> A code that represents a unit of inventory. The field length for non-inventory entry is 60 positions; so if your entry exceeds 56 positions, it is truncated. <i>Item: Alphanumeric, 12 positions; optional.</i> <i>Description: Alphanumeric, 120 positions; display-only.</i>
SKU	The item's unique characteristics, such as its color or size. <i>Alphanumeric, three 4-position fields; optional.</i>
Qty due (Quantity due)	The amount remaining to be received for this line item, in the retailer's unit of measure. <i>Numeric, 7 positions; display-only.</i>
U/M (Unit of measure)	A code that represents the unit of measure in which an item is purchased/stocked, such as EA (for a single unit), or DZ (for dozens). This field represents your unit of measure, which may differ from the vendor's unit of measure. See Working with Units of Measure (WUOM). <i>Alphanumeric, 3 positions; optional.</i>
Vendor Item	The vendor's item number for the item. See Working with Vendor Items (WVNI). <i>Alphanumeric, 20 positions; optional.</i>
Qty rec (Quantity received)	The number of units of the item being received. The Over Receipt % (A61) system control value allows you to receive more than the quantity ordered, up to a user-defined percentage limit. This allows you to receive merchandise if the vendor over-ships. The Under Receipt % (A62) system control value allows you to close a purchase order line when most of the merchandise has been received, if the quantity received is within a user-defined tolerance percentage. This allows you to close a purchase order line automatically if the vendor under-ships. The PO Receiving Overage Warning Window opens if you enter a receipt quantity that is greater than the quantity ordered and the Display Purchase Order Receiving Overage Warning Message (F29) system control value is selected. See Receiving Overages and Underages. <i>Numeric, 7 positions; required.</i>

Field	Description
Locat (Location)	The warehouse location where the item quantity received will be placed. The location code entered is validated against the Location table. The location type must be compatible with the item and the location cannot be frozen. If more than one location has been specified to receive an item, the location field is blank and a plus (+) sign is shown. Leave this field blank if you are using the Suggest Location Placement function and you want the system to suggest the locations where the merchandise should be placed. The Suggest Location Placement (A27) system control value determines whether this function is being used. Leave this field blank to have the merchandise placed in the primary location from the Item/SKU table or in a primary location for the item in the receiving warehouse. The following system control values determine which location will default: • Default Primary Location - Suspense Placement and PO Receipts (C08): determines whether the primary location from the SKU table defaults. • Default Primary Location from an Item Warehouse (G06): defines whether a primary location for the item in the receiving warehouse defaults; in this case the system will default the first primary location, in alphanumeric order, for the item in the receiving warehouse. • If both system control values are selected, the item warehouse location for the receiving warehouse will override the item's primary location from the SKU table. If the system cannot find a primary location for an item in the specified warehouse, an error message similar to the following indicates: No Default Location was found. Please enter a Location. The Confirm Location Creation pop-up window indicates that you entered a new primary location for an item and the Allow Multiple Primary Item Locations (D12) system control value is set to CONFIRM. The system may update the item's primary location in the SKU table (the primary primary) depending on the setting of the Update Primary Primary Location for Item During Receiving (I35) system control value. See that system control value for more information. If the Default Primary Location from an Item Warehouse (G06) value in the System Control table is selected, a prompt window will display location information for item locations in the warehouse specified on the purchase order detail line. <i>Alphanumeric, 7 positions; optional.</i>

Screen Option	Procedure
Change a line item	Select Change for a detail line to advance to the P/O Receipt Detail Screen , where you can change the receipt information for a particular item. See Using the Change Purchase Order Details Method .
View prior receipts for a line item	Select Prior Receipts for a detail line to advance to the Display Current Receipts Screen .

Screen Option	Procedure
Suggest warehouse locations for an item, place the item in more than one location, or override the warehouse	Select Locations for a detail line to have the system suggest where the item should be placed, to place the item in more than one location, or to override the warehouse. You advance to the Work with PO Receipt Locations Screen .
Receive an entire line	Select Receive for a detail line to receive the entire line. See Receiving Methods .
Turn Suspense Receiving on or off for one line item	Select Suspense On/Off for a detail line to turn Suspense receiving on or off. If the suspense flag is on, all quantities received for the line will be placed in suspense. If the suspense flag is off, all quantities will be received directly into on-hand inventory. The word <i>Suspense</i> appears next to the Location field when the Suspense flag is on. See Receiving into Suspense .
 Note: This option is available only if the Allow Receipt to Suspense (A59) system control value is selected.	
View messages for one line item	Select Messages for a detail line to advance to the Work with PO Messages Screen .
Enter serial numbers for an item	Select Serial # for a detail line to advance to the Enter Serial Numbers Screen . This option is available only if you have already entered a receipt quantity and if the <i>Serial number</i> field in the Item table is selected. If the item is set up for serial numbers, you advance automatically to this screen when you accept the purchase order.
Add a line to the Purchase Order	Select Add Line to advance to the Create PO Detail Standard Screen (Adding Lines To A Purchase Order) to add a line to the purchase order.
Display purchase order summary	Select Summary to advance to the Display Current Receipts Screen .
Receive the entire purchase order	Select Receive P/O to receive the entire purchase order. The quantity due for each line will be updated as received. See Receiving an Entire Purchase Order Into Suspense .
 Note: This option is available only if you have authority to the Receive All Permission (B21) secured feature.	
Accept the purchase order receipts	After clearing the entry in the <i>Ln #</i> field, if any, select Accept to accept the receipt information you entered. The system will be updated with the quantities received in the designated locations. If all lines have been received, this closes the purchase order, even if you have placed items into Suspense.

Screen Option	Procedure
Reject the entries	Select Reject to return to the Select P/O For Receipt Screen . The system rejects any entries that you have made to the purchase order during the session. A pop-up window opens for you to confirm or cancel the reject request.
Work with additional purchase order charges	Select Add'l Charges to enter additional charges for the purchase order.
Receive the entire purchase order into suspense	Select Receive Suspense to receive the entire balance of the purchase order into suspense. The quantity due for each item on the purchase order is placed into suspense and the purchase order is closed. See Receiving an Entire Purchase Order Into Suspense .
 Note: This option is available only if the Allow Receipt to Suspense (A59) system control value is selected.	
View purchase order messages	Select P/O Messages to advance to the Work with PO Messages Screen .
Change the exchange rate for the purchase order	Select Rate to enter a different exchange rate for the purchase order. See Changing the Exchange Rate .
View the vendor notes for the purchase order	Select Vendor Notes to advance to the Work with Vendor Notes Screen .

Receiving Methods

Available methods: Inventory on a purchase order can be received on a line-by-line basis, or the entire purchase order can be received in one step. Individual items can be received into suspense, or the entire purchase order can be received into suspense. Additional receiving information can also be entered for any line item on a purchase order, regardless of the receiving method used. There are three ways to receive lines individually and two ways to receive an entire purchase order.

Use this method . . .	When . . .
Direct entry	the quantity received is different from the quantity due.
Receive option	the quantity due is the same as the quantity received.
Change PO details	you need to do any of the following: override the cost, override the unit of measure, change the warehouse code, change the receipt date, change the customs date, change currency rate, enter a disposition code, or force the line complete.
Receive an entire PO into inventory	all or most of the purchase order is being received and you are placing the merchandise into inventory.
Receive an entire PO into suspense	all or most of the purchase order is being received and you are placing the merchandise into suspense.

You can use any combination of receiving methods on a purchase order. For example:

- If there are many line items on the purchase order that need individual attention, you can receive the items one line at a time.
- If most or all of the items are received, you can receive the entire purchase order and change individual line information to minimize data entry.
- You can enter override information for a receipt in addition to indicating the quantity received and the placement locations.



Note:

It is important to clear the entry in the *Ln #* field, if any, before you select Accept.

For more information:

- [Using the Direct Entry Method](#)
- [Using the Receive Option Method](#)
- [Using the Change Purchase Order Details Method](#)

Using the Direct Entry Method

Why use this method? The Direct Entry method allows you to type the receipt quantity and the location, if applicable, directly into fields on the [Work with P/O Receipt Detail Screen](#). Use this method when the quantity received is *different* from the quantity due. You can use any of the following options to enter the location where the merchandise will be placed:

- default the item/SKU's primary location as the placement location (if the [Default Primary Location - Suspense Placement and PO Receipts \(C08\)](#) system control value is selected)
- default a primary location for the item in the receiving warehouse (if the [Default Primary Location from an Item Warehouse \(G06\)](#) system control value is selected this default location overrides the item/SKU's primary location)
- enter the location code in the [Locat \(Location\)](#) field if the merchandise is only being placed in one location, or if it is not being placed in the primary location
- use the *Locs* option to have the system suggest the location where the merchandise should be placed if using Suggest Location Placement
- use the *Locs* option to place the merchandise in more than one location or warehouse
- place a line item into suspense; see [Receiving into Suspense](#)

You can use the Direct Entry method to enter the quantity and location and also use the Change PO Details method to enter additional information about the receipt, if necessary.

You can also use the Direct Entry method to maintain individual purchase order lines when the entire purchase order is received into inventory or into suspense, if necessary.

Instructions: Use the following steps at the [Work with P/O Receipt Detail Screen](#) to receive items line-by-line *when the quantity received is different from the quantity due*, and you need to enter the receipt quantity.

1. Enter the quantity received in the *Qty rec* field. See [Receiving Overages and Underages](#).
2. Select OK to display the location if the Default Primary Location - Suspense Placement and PO Receipts (C08) system control value is selected. The primary location from the Item/SKU table is indicated, *or*:

3. Select OK to display a primary location for the receiving warehouse if the *Default Primary Location from an Item Warehouse (G06)* system control value is selected; this location will override the location from the Item/SKU table, or:
4. Enter the location code where the merchandise is being placed in the *Location* field if the primary location is not displayed and you are placing the merchandise in only one location, or if the merchandise is not being placed in the displayed location. The following message indicates if an invalid location code is entered: `Location (XXXXXXX) does not exist.`
5. The Confirm Location Creation pop-up window opens if you or the system enters a new primary location code for an item and the Allow Multiple Primary Item Locations (D12) system control value is set to CONFIRM. Select OK to accept the multiple primary location or Select Exit to cancel.
6. Select Locations for an item and select OK to advance to the [Work with PO Receipt Locations Screen](#) to have the system recommend the locations for placement if you are using the Suggest Location Placement feature or if you are placing the merchandise in more than one location or warehouse. The *Location* field should be left blank when selecting Locations.
7. Select Suspend On/Off for an item to change the suspense receiving status of a line. The word *Suspense* displays next to the *Location* field and indicates the line item will be placed into suspense when the purchase order is accepted. If the word *Suspense* is not displayed, the quantity received for the line will be placed into inventory. A *Location* is not required if you are placing the item into suspense.
8. Continue with the above steps until all receipts and placements have been entered.
9. Clear the entry in the *Ln #* field, if any, so that the field is blank.
10. Select Accept to accept your receipt entries. The system validates your entries and highlights any fields you need to correct or gives you an error message. Correct any fields again.
11. Select Reject to reject your receipt and placement entries. A pop-up window opens for you to confirm or cancel the reject request.

Using the Receive Option Method

Why use this method? The Receive Option method allows you to default the quantity due as the receipt quantity to minimize data entry. Use this method when the quantity received is *the same* as the quantity due. You can use any of the following options to enter the location where the merchandise will be placed:

- default the primary location as the placement location (if the Default Primary Location - Suspense Placement and PO Receipts (C08) system control value is selected)
- default a primary location for the item in the receiving warehouse (if the *Default Primary Location from an Item Warehouse (G06)* system control value is selected; this default location overrides the item/SKU's primary location)
- enter the location code in the [Locat \(Location\)](#) field if the merchandise is being placed in only one location or if it is not being placed in a primary location
- use the *Locs* option to have the system suggest the location where the merchandise should be placed if using Suggest Location Placement
- use the *Locs* option to place the merchandise in more than one location or warehouse

You can use the Receive Option method to enter the quantity and location, and also use the Change PO Details method to enter additional information about the receipt, if necessary.

Instructions: Use the following steps to receive items line-by-line *when the quantity received is the same as the quantity due.*

1. Select Receive for the first line item for as many items as you are receiving at the [Work with P/O Receipt Detail Screen](#). The amount in the *Qty due* field is shown in the *Qty Rec* field.
2. If the Default Primary Location - Suspense Placement and PO Receipts (C08) system control value is selected, the primary location for the item in the SKU table is shown in the *Location* field, or:
3. If the *Default Primary Location from an Item Warehouse (G06)* system control value is selected, a primary location for the item in the receiving warehouse is shown in the *Location* field; this location overrides the location for the item in the SKU table, or:
4. Enter the location code where the merchandise is being placed in the *Location* field if the primary location is not displayed and you are placing the merchandise in only one location, or if the merchandise is not being placed in the primary location. The following message indicates if an invalid location code is entered: `Location (XXXXXXX) does not exist.`
5. The Confirm Location Creation pop-up window opens if you enter a new primary location code for an item and the Allow Multiple Primary Item Locations (D12) system control value is set to CONFIRM. Select OK to accept the multiple primary location or select Exit to cancel.
6. Select Locations for an item to have the system suggest the locations for placement if you are using the Suggest Location Placement function or if you are placing the merchandise in more than one location or warehouse. If you have selected Locations in multiple fields, the [Work with PO Receipt Locations Screen](#) cycles you from one entry to the next.
7. Select Suspense On/Off for an item to change the suspense receiving status of a line. The word *Suspense* displays next to the *Location* field and indicates the line item will be placed into suspense when the purchase order is accepted. If the word *Suspense* is not displayed, the quantity received for the line will be placed into inventory. A *Location* is not required if you are placing the item into suspense. See [Receiving into Suspense](#).
8. Continue with the above steps until all receipts and placements have been entered.
9. Clear the entry in the *Ln #* field, if any, so that the field is blank.
10. Select Accept to accept your receipt entries. The system validates your entries and highlights any fields you need to correct or gives you an error message. Correct any fields as needed.
11. Select Reject to reject your receipt and placement entries. A pop-up window opens for you to confirm or cancel the reject request.

Using the Change Purchase Order Details Method

Why use this method? The Change Purchase Order Details method allows you to display the [P/O Receipt Detail Screen](#), where you can enter the quantity received and the location where the merchandise will be placed, add or change additional receipt information for the item or force the line complete. Use this method when you need to override any of the following information for a receipt, or to force the line complete:

- unit of measure
- purchase cost
- warehouse/location
- receipt date
- customs date
- currency rate

You can use any of the following options to enter the quantity received and the location where the merchandise will be placed when this receiving method is used:

- enter the location code in the *Location* field on the [P/O Receipt Detail Screen](#) if the merchandise is being placed in only one location.
- use the *Location* option to have the system suggest the location where the merchandise should be placed if using Suggest Location Placement.
- use the *Location* option to place the merchandise in more than one location or warehouse.

**Note:**

You can use any of the other receiving methods to record the receipt quantities and location placements and then use the Change Purchase Order Details function to enter or change any additional information about a receipt. For example, you can receive the entire purchase order using the default primary location option, and then use Change PO Details to override the cost of a particular item.

P/O Receipt Detail Screen

How to display this screen: Select Change for a detail line on the [Work with P/O Receipt Detail Screen](#).

Field	Description
Receipt qty (Receipt quantity)	Enter the number of units received, in your (retailer's) unit of measure; the number remaining to be received is displayed above the data entry portion of this screen. The Over Receipt % (A61) system control value allows you to receive more than the quantity ordered, up to a user-defined percentage limit. This allows you to receive merchandise if the vendor over-ships. The Under Receipt % (A62) system control value allows you to close a purchase order line when most of the merchandise has been received. This allows you to close a purchase order line automatically if the vendor under-ships. The PO Receiving Overage Warning Window opens when the quantity received is greater than the quantity ordered and the Display Purchase Order Receiving Overage Warning Message (F29) system control value is selected. See Receiving Overages and Underages. <i>Numeric, 7 positions; required.</i>
UoM (Unit of measure)	A code that represents a purchase order unit of measure for an item, such as EA (for a single unit) or DZ (for dozens). This field represents your own, not the vendor's, unit of measure. See Working with Units of Measure (WUOM). <i>Alphanumeric, 3 positions; required.</i>

Field	Description
Gross cost	Enter in the gross cost (per retailer's unit of measure) at receiving time; the system displays the projected cost (from the purchase order) for comparison.  Note: The Display Cost in Inventory (A38) secured feature controls the display of this field.
Discount	<i>Numeric, 10 positions; optional.</i> The total combined amount of all discounts applied towards this detail line. This includes: <i>Primary discount:</i> The primary discount percentage the system applies towards all items purchased from this vendor. Primary discounts are defined in the Vendor table. <i>Percentage/Unit discounts:</i> The three discounts defined in the Vendor Discount table that the system applies towards all items purchased from this vendor. These discounts are defined as either a percentage or unit discount. If you change the amount in the <i>Gross cost</i> field, the system recalculates all discounts for this detail line and displays the new net cost in the <i>Net cost</i> field. <i>Numeric, 13 positions with a 2-place decimal; display-only.</i>
Net cost	The cost of this detail line, which is calculated by multiplying the quantity ordered and the price, adding the surcharge and subtracting the discount. The system applies the discount from the <i>Terms</i> field in Working with Vendors (WVEN) to the cost of each item you receive if the Vendor Discount % to Costing at Receiving (D76) system control value is selected.  Note: The Display Cost in Inventory (A38) secured feature controls the display of this field. <i>Numeric, 13 positions with a 4-place decimal; display-only.</i>

Field	Description
Whse (Warehouse)	The code that identifies the warehouse where the merchandise will be placed. The code of the warehouse for which the merchandise was ordered defaults and can be overridden. The code is validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). Override the code only if the entire receipt quantity for the line is being placed in the same warehouse. If the quantity received is being placed in more than one warehouse, select Location to display the Work with PO Receipt Locations Screen, which allows you to place the merchandise in more than one location or warehouse. <i>Numeric, 3 positions; required.</i>
Location	The warehouse location where the merchandise is being placed. The location code entered is validated against the Location table. The warehouse location from the Work with P/O Receipt Detail Screen defaults in this field, but you can override it. Enter a location only if the entire receipt quantity is being placed in one location. The Confirm Location Creation pop-up window opens if you enter a new primary location code for an item and the Allow Multiple Primary Item Locations (D12) system control value is set to CONFIRM. Select Location and click the arrow in the location field to display a list of locations or to create a new temporary location in which to place the item. If the quantity received is being placed in more than one location, select Location to display the Work with PO Receipt Locations Screen, which allows you to place the merchandise in more than one location or warehouse. The system may update the item's primary location in the SKU table (the primary primary) depending on the setting of the Update Primary Primary Location for Item During Receiving (I35) system control value. See that system control value for more information. <i>Alphanumeric, 7 positions; required.</i>
Receipt date	The date of the receipt. If you leave this field blank, the system defaults to today's date. <i>Numeric, 6 positions (user date format); optional.</i>
Customs date	The date the receipt was received in customs or consolidation center for international orders. <i>Numeric, 6 positions (user date format); optional.</i>
Currency rate	The currency conversion rate at the time of the receipt. This is the rate of cost against the base currency. You can enter this at receiving time for each item. <i>Numeric, 12 positions with a 7-place decimal; optional.</i>
Screen Option	Procedure
Work with PO receipt locations	Select Location to have the system suggest where the merchandise should be placed, or to place the merchandise in more than one location or warehouse. See Work with PO Receipt Locations Screen .
View messages for a line item	Select P/O Detail Msg to advance to the Work with PO Messages Screen .

Screen Option	Procedure
View purchase order messages	Select P/O Messages to advance to the Work with PO Messages Screen .
View the vendor notes	Select Vendor Notes to advance to the Work with Vendor Notes Screen .

Instructions: Use the following steps to receive items one at a time if you have to add or change some of the information about the receipt, or to force the line complete.

1. Enter the quantity received in the *Qty rec* field. See [Receiving Overages and Underages](#) for instructions on processing receiving overages and underages.
2. Enter the location code where the merchandise is being placed in the *Location* field if a primary location is not displayed and you are placing the merchandise in only one location, or if the merchandise is not being placed in the displayed location. The following message indicates if an invalid location code is entered: *Location (XXXXXXX) does not exist*.
3. The Confirm Location Creation pop-up window opens if you enter a new primary location code for an item and the Allow Multiple Primary Item Locations (D12) system control value is set to CONFIRM. Select OK to accept the multiple primary location or select Exit to cancel.
4. To display a list of valid locations, or to create a new temporary location in which to place the item, select Location and click on the arrow in the location field to display the [Select Location Screen](#).
5. Complete all other applicable fields. Refer to the field descriptions for instructions on completing the fields.
6. Select OK when you have completed all applicable fields.
7. Select Location to place the merchandise in more than one location or warehouse. See [Work with PO Receipt Locations Screen](#).
8. Select Exit to return to the [Work with P/O Receipt Detail Screen](#). The receipt quantity and location display if you are placing the merchandise in one location.
9. Select Suspense On/Off for a detail line at the [Work with P/O Receipt Detail Screen](#) to change the suspense receiving status of a line. The word *Suspense* displays next to the *Location* field and indicates the line item will be placed into suspense when the purchase order is accepted. If the word *Suspense* is not displayed, the quantity received for the line will be placed into inventory. A *Location* is not required if you are placing the item into suspense. See [Receiving into Suspense](#).
10. Select Accept to accept your receipt entries. The system validates your entries and highlights any fields you need to correct or gives you an error message. Correct any fields as needed.
11. Select Reject to reject your receipt and placement entries. A pop-up window opens for you to confirm or cancel the reject request.

Receiving an Entire Purchase Order into Inventory

Why use this method? An entire purchase order is received in one transaction to minimize data entry when *all or most of* the item quantities on the purchase order are received. If most or all of the items received will be placed into inventory, you can select Receive P/O to mark each line on the purchase order as received. The system will update the quantity received field for each line with the remaining quantity due for the item.

Secured feature: The Receive P/O option is available only if you have authority to the [Receive All Permission \(B21\)](#) secured feature.

Adjustments prior to receipt: You can make any necessary adjustments to individual lines before the receipt transactions are accepted, if necessary. You can:

- change the quantity received
- un-receive the line if none of the items were received
- add or override the purchase order receipt details
- place the items in more than one location or warehouse
- place individual line items into suspense.

For example, if you received 10 line items on a 12 line purchase order, you can receive the entire purchase order and then un-receive the two line items that were not shipped.

Placement location: You can use any of the following options to enter the location where the merchandise will be placed:

- default the item/SKU's primary location as the placement location (if the Default Primary Location - Suspense Placement and PO Receipts (C08) system control value is selected)
- default a primary location for the item in the receiving warehouse (if the *Default Primary Location from an Item Warehouse (G06)* system control value is selected this default location overrides item/SKU's primary location)
- type the location code in the *Location* field if the merchandise is being placed in only one location, or if it is not being placed in the default location
- use the *Locs* option to have the system suggest the location where the merchandise should be placed if using Suggest Location Placement
- use the *Locs* option to place the merchandise in more than one location or warehouse

Instructions: Use the following steps to receive an entire purchase order into inventory and make adjustments to individual line items. See [Using the Direct Entry Method](#) or [Using the Change Purchase Order Details Method](#) for more detailed information about working with individual line items if necessary.

1. Select Receive P/O at the [Work with P/O Receipt Detail Screen](#) to receive the entire purchase order into inventory. The *Qty rec* field for each line is updated with the amount in the *Qty due* field.
2. The primary location defined for the item in the Item/SKU table defaults in the *Location* field if the Default Primary Location - Suspense Placement and PO Receipts (C08) system control value is selected, or:
3. The first primary location (in alphanumeric order) for the item in the receiving warehouse defaults if the *Default Primary Location from an Item Warehouse (G06)* system control value is selected; this location overrides the item/SKU's primary location, or:
4. Enter the code of the location where the received items will be placed in the *Location* field if you are placing the item in only one location, or if a primary location defaults and you are not placing the item in the displayed location.
5. The Confirm Location Creation pop-up window opens if you enter a new primary location code for an item and the Allow Multiple Primary Item Locations (D12) system control value is set to CONFIRM.
6. To display a list of valid locations, or to create a new temporary location in which to place the item, position the cursor on the *Location* field, prompt and select Create Temp to display the [Creating Temporary Locations at Receiving](#).

7. Leave the *Location* field blank if you are using the Suggest Location Placement feature, if you are placing the item in multiple locations or warehouses, or if you are placing the item in suspense.
8. Make any changes to the quantity received for a line by typing the correct quantity directly over the value in the *Qty rec* field. See [Receiving Overages and Underages](#) for instructions on receiving overages and underages.
9. Make any changes to the location where the item will be placed for a line by typing the correct location directly over the value in the *Location* field if the item is being placed in only one location.
10. Select Locations for a detail line to display the [Work with PO Receipt Locations Screen](#) to have the system suggest the locations where the item should be placed if you are using the Suggest Location Placement feature, or to place the item in more than one location or warehouse.
11. Select Change for a detail line to change the purchase order details. See [Using the Change Purchase Order Details Method](#).
12. Select Suspense On/Off for a detail line to change the suspense receiving status of a line. The word *Suspense* displays next to the *Location* field and indicates the line item will be placed into suspense when the purchase order is accepted. If the word *Suspense* is not displayed, the quantity received for the line will be placed into inventory. A *Location* is not required if you are placing the item into suspense. See [Receiving into Suspense](#).
13. To un-receive a line, position the cursor at the *Qty rec* and *Location* fields and delete the values.
14. Select Accept to accept your receipts. Any errors will be highlighted on the screen. Make any necessary corrections and select Accept again.
15. Select Reject to reject all receipts. A pop-up window opens allowing you to confirm or cancel the reject request.

Receiving an Entire Purchase Order Into Suspense

Why use this method? An entire purchase order is received in one transaction to minimize data entry when *all or most of* the item quantities on the purchase order are received. If most or all of the items received will be placed into suspense, you can select Receive Suspense to mark each line on the purchase order as received into suspense. The system will update the quantity received field for each line with the remaining quantity due for the item.

Merchandise is placed into suspense when you want to record the receipt, but you do not want to place the merchandise immediately into your on-hand inventory.

You can make any necessary corrections to individual line items as necessary. You can:

- change the quantity received
- un-receive the line if none of the items were received
- add or override purchase order receipt details
- place the items into inventory

Instructions: Use the following steps to receive an entire purchase order into suspense and make adjustments to individual line items. See [Using the Direct Entry Method](#) or [Using the Change Purchase Order Details Method](#) for more detailed information about working with individual line items if necessary.

1. Select Receive Suspense at the [Work with P/O Receipt Detail Screen](#) to receive the entire purchase order into suspense.

2. Make any changes to the quantity received for a line by typing the correct quantity directly over the value in the *Qty rec* field. See [Receiving Overages and Underages](#) for instructions on processing receiving overages and underages.
3. Select Suspend On/Off for a detail line to change the suspense receiving status of a line. The word *Suspense* displays next to the *Location* field and indicates the line item will be placed into suspense when the purchase order is accepted. If the word *Suspense* is not displayed, the quantity received for the line will be placed into inventory when the purchase order is accepted. A *Location* is not required if you are placing items into suspense.
4. If you are receiving a line into inventory, type the code of the location where the item will be placed in the *Location* field if you are placing the item in only one location. To display a list of valid locations, or to create a new temporary location in which to place the item, position the cursor on the *Location* field and prompt to display the [Select Location Screen](#).
5. If you are receiving a line into inventory, select Locations for a detail line to display the [Work with PO Receipt Locations Screen](#) to have the system suggest the locations where the item should be placed if you are using the Suggest Location Placement feature, or to place the item in more than one location or warehouse.
6. To un-receive a line, position the cursor at the *Qty rec* and *Location* fields and delete the values.
7. Select Accept to accept your receipts. Any errors will be highlighted on the screen. Make any necessary corrections and select Accept again.
8. Select Reject to reject all receipts. A pop-up window opens for you to confirm or cancel the reject request.

Suspense updates: The system performs the following updates when merchandise is received into suspense:

- Creates a record in the PO Suspense table for each purchase order line indicating the quantity received into suspense.
- Creates a record in the PO Receipt table for each purchase order line, with the *Suspense* flag set to Y.
- Updates the *Received quantity* for each purchase order line on the [Purchase Receipts History Screen](#) by the quantity received into suspense.
- Decreases the *Quantity Due* for each purchase order line on the First Display Purchase Order Detail Screen by the quantity received into suspense.
- Updates the *Suspense quantity* on the [Display Item/Warehouse Information Screen](#) by the quantity received into suspense.

The following updates *do not occur* when merchandise is received into suspense:

- The on-hand quantity for the item is not changed.
- The costing calculation is not performed.
- Vendor Item analysis is not performed.

These updates occur when the merchandise is transferred from suspense to inventory using the Placing Suspended Stock (SUSP) menu option.

Changing the Exchange Rate

Purpose: The currency exchange rate for the entire purchase order can be changed at receiving if the exchange rate has changed. Enter the new currency rate on the [Work with P/O Receipt Detail Screen](#).

Instructions:

1. Select Rate at the [Work with P/O Receipt Detail Screen](#) to make the *Rate* field enterable.
2. Enter the new exchange rate in the *Rate* field.
3. The new rate will be applied to the entire purchase order unless the rate has been overridden for a particular line item. See [Using the Change Purchase Order Details Method](#) for instructions on overriding the exchange rate for an individual purchase order line.

Receiving Overages and Underages

Overages: At times, a vendor can overship an item. The Over Receipt % (A61) system control value allows you to receive more than the quantity ordered for an item if the quantity received is within the percentage.

If a vendor ships you more merchandise than you ordered, the system allows you to record the receipt if the overage is within an acceptable tolerance limit. For example, if you set the Over Receipt % (A61) system control value to 10%, you can receive a quantity up to ten percent above the amount that was ordered. If the overage exceeds the tolerance amount, the following error message indicates:

`Invalid over receipt quantity`

You can then override the Over Receipt % (A61) if the [Override Tolerance \(A18\)](#) secured feature is set to *ALLOW. If the Override Tolerance (A18) secured feature is set to *EXCLUDE, the system continues to use the Over Receipt % (A61) system control value to determine whether an overage can be received.

Overage Warning pop-up window: If the [Display Purchase Order Receiving Overage Warning Message \(F29\)](#) system control value is selected, the [PO Receiving Overage Warning Window](#) opens when the quantity received is greater than the quantity ordered.

When the pop-up window opens: The system determines when to display this window based on the Over Receipt % (A61) system control value and the Override Tolerance (A18) secured feature.

If the Override Tolerance (A18) secured feature authority is set to *ALLOW, the system:

- Allows you to enter a receipt quantity that is greater than the Over Receipt % (A61).
- Displays the window each time the quantity received is greater than the quantity ordered.

If the Override Tolerance (A18) secured feature authority is set to *EXCLUDE, the system:

- Does not allow you to enter a receipt quantity that is greater than the Over Receipt % (A61).
- Displays the window only when the quantity received is greater than the quantity ordered and less than the Over Receipt % (A61).
- Displays the `Invalid over receipt quantity` error message if you select OK on the [PO Receiving Overage Warning Window](#) without changing the receipt quantity to a quantity that does not exceed the Over Receipt % (A61).

PO Receiving Overage Warning Window

Field	Description
Qty received is xx.xx % greater than the quantity ordered)	Defines the percentage the receipt quantity is over the order quantity. The system uses the following calculation to determine the percentage over: $[(\text{quantity received} - \text{quantity ordered}) / \text{quantity ordered}] \times 100 = \text{percentage the receipt quantity is over the quantity ordered}$ <i>Numeric, 7 positions; display-only.</i>
PO ln. # (Purchase order line number)	The purchase order line number that contains the over receipt quantity. <i>Numeric, 3 positions; display-only.</i>
Qty rec (Quantity received)	The receipt quantity (in your unit of measure, not the vendor's) for this purchase order line. The quantity you entered defaults in this field, but can be overridden. <i>Numeric, 7 positions; optional.</i>

Instructions: Use the following steps to enter a receipt quantity that meets the receipt overage requirements defined.

1. Enter a receipt quantity in the *Quantity received* field if you wish to override the quantity you previously entered.
2. The system returns you to the [Work with P/O Receipt Detail Screen](#) or the [P/O Receipt Detail Screen](#) with the receipt quantity you entered defaulting in the *Quantity received* field for the purchase order line.
3. The system accepts the quantity you entered or redisplays the pop-up window if the quantity you entered still exceeds the overage requirements.
4. If the purchase order line meets the overage requirements, the system will display a pop-up window for the next purchase order line that exceeds the overage requirements.



Note:

The system displays a window for each purchase order line that contains a receipt quantity that is greater than the ordered quantity each time you select an option or click OK.

Underages: At times, a vendor can under-ship an item and can not fulfill the entire purchase request. The [Under Receipt % \(A62\)](#) system control value allows the system to close a purchase order line if only a certain percentage of the order quantity is received.

If a vendor short-ships an item and the quantity received is within the defined tolerance, the purchase order line will be closed even if the full order quantity was not received. This allows you to close purchase order lines when vendors short-ship merchandise and are unable to complete the shipment.

For example, if you define the Under Receipt % (A62) at 10%, a purchase order line will be closed when at least 90% of the merchandise is received. If you order 100 units and receive 92 units, the line will be closed when the receipt for 92 units is accepted.

Enter Serial Numbers Screen

Purpose: Use this screen to specify the serial number of each unit of an item you are receiving. You use serial numbers to track inventory activity, such as returns or shipments, after the units have been received into the warehouse. If the Serial number flag is selected in the Item table, the system records the item's additional inventory activity, such as confirmations, by prompting you for the serial numbers of units affected by that activity. See [Assigning Items to Warehouses](#).

How to display this screen: Select Serial # for a serial numbered item at the [Work with P/O Receipt Detail Screen](#) (provided you have already entered the receipt quantity). You also advance to this screen automatically when you accept the purchase order if you have not already entered serial numbers for a serial numbered item.

Field	Description
Serial #s	The serial number(s) of each unit of the item or SKU you are receiving on this purchase order. This screen provides a field for entry of a serial number for each unit. <i>Alphanumeric, 20 positions each field; required.</i>

Instructions:

1. Enter the serial number for each unit of the item you are receiving in each field provided. When you have completed each serial number field on the screen, select OK.
2. The system highlights any serial number fields that are not complete, or that contain serial numbers that already exist for the item (Note: it does not check the status of the serial number). Complete or correct any fields as needed.
3. Select Submit to submit the serial number entry; otherwise, select Reject to reject and return to the [Work with P/O Receipt Detail Screen](#).



Note:

You will not be able to accept the purchase order until you complete each serial number field on this screen.

Display Current Receipts Screen

Purpose: Use this screen to review receipt information for each item on the purchase order, such as quantity ordered and price.

How to display this screen: Select Summary on the [Work with P/O Receipt Detail Screen](#).

Field	Description
P/O #	The number of the purchase order you are reviewing. <i>Numeric, 7 positions; display-only.</i>
Ln#	The purchase order line number. <i>Numeric, 3 positions; optional.</i>
Item	An item on the purchase order you are reviewing. <i>Alphanumeric, 12 positions; optional.</i>
Colr size othr	The SKU elements which further define the item. <i>Alphanumeric, 14 positions; optional.</i>

Field	Description
Ordered	The amount ordered for this line item, in your unit of measure, not the vendor's. <i>Numeric, 7 positions; display-only.</i>
Price	The price of this item as defined in Working with Vendor Items (WVNI). This price represents the price per unit in your own unit of measure, not the vendor's. For example, if the vendor sells an item in pairs, and defines the price in the vendor item table as \$12.00, but you sell the item in single units (eaches), the price displayed in this field would be \$6.00. If a price does not exist in the Vendor Item table, the system uses the cost from Work with Item/SKUs (fast path = MITM).
	 Note: The Display Cost in Inventory (A38) secured feature controls the display of this field.
	<i>Numeric, 13 positions with a 4-place decimal; display-only.</i>
Balance	The quantity of the item remaining to receive. <i>Numeric, 7 positions; display-only.</i>
Extension	The extended price of this item. The system uses the following calculation to determine the extended price: quantity received x the vendor price = extended cost. <i>Numeric, 20 positions with a 2-place decimal; display-only.</i>

Work with PO Receipt Locations Screen

Purpose: Use this screen to place the merchandise in more than one location or warehouse or to have the system suggest the locations where the merchandise should be placed.

This screen is used during purchase order receipts when you are placing merchandise into inventory, a pending putaway warehouse, or a staging warehouse. It is also used during Placing Suspended Stock (SUSP) when you are transferring merchandise from suspense to inventory, and in [Suggest Location Placement \(MSLO\)](#).

Suggest location placement: When you use [Suggest Warehouse/Location Placement](#), the system checks the system control values related to suggesting location placement to determine which locations to suggest.

When you use Standard warehouse/location placement, the system checks:

- Suggest Location Placement (A27), which controls whether the function is used.
- Type of Location to Search First during Suggest Location Placement (C40), which defines the location type that will be searched first.
- Type of Location to Search Second during Suggest Location Placement (C41), which defines the location type that will be searched second.
- Type of Location to Search Third during Suggest Location Placement (C42), which defines the location type that will be searched last.

- Suggest Multiple Items in a Location during Suggest Location Placement (C43), which determines whether the merchandise can be placed in a location the contains other merchandise when the system is searching for any available location.
- [Location Capacity Method \(A31\)](#), which determines how the system determines when a location is full.

See [Standard Warehouse/Location Placement](#) for more information.

To default the primary primary location: If you wish to default the item's primary primary location, or a primary location for the item in the receiving warehouse, select Receive for the item on the [Work with P/O Receipt Detail Screen](#). See [Receiving Methods](#) for more information on the system control values that control the default location.

How to display this screen: Select Locations for a purchase order line on the [Work with P/O Receipt Detail Screen](#). You can also display this screen by selecting Prior Receipts for a suspended item at the [Suspense Placement By Item Screen](#), [Suspense Placement By PO Screen](#), or [Suspense Placement By PO Control # Screen](#). You must also enter the quantity to place.

Field	Description
P/O	The number assigned to the purchase order you are working with. <i>Numeric, 7 positions; display-only.</i>
Ln.	The purchase order detail line number. <i>Numeric, 3 positions; display-only.</i>
Item	An item and SKU on the purchase order. <i>Item: Alphanumeric, 12 positions; display-only.</i> <i>SKU: Alphanumeric, three 4-position fields; display-only.</i>
Qty received	The number of units, in your unit of measure, not the vendor's, of the item being received. <i>Numeric, 7 positions; display-only.</i>
Qty placed:	The total quantity to be placed across all locations and warehouses. <i>Numeric, 7 positions; display-only.</i>
Qty	The quantity to be placed in the associated location. • The quantity is recommended by the system when using Suggest Location Placement (MSLO). The quantity can be changed and additional quantities and locations can be added. • A quantity must be entered if you are not using Suggest Location Placement. • The total quantity entered for all locations must be equal to the <i>Total receipt qty</i>. <i>Numeric, 7 positions; required.</i>
Whs (Warehouse)	The code of the warehouse where the items will be placed. The warehouse code on the purchase order defaults. You can enter a warehouse code when you select Override Whse to override the warehouse. The warehouse code is validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS) . <i>Numeric, 3 positions; display-only.</i>

Field	Description
Location	The location where the associated quantity will be placed. - The location is recommended by the system when using the Suggest Location Placement function. The location can be changed and additional quantities and locations can be added. - A location must be entered if you are not using the Suggest Location Placement function. The location will be validated against the Location table. - The Confirm Location Creation pop-up window opens if you enter a new primary location code for an item and the Allow Multiple Primary Item Locations (D12) system control value is set to CONFIRM.

 **Note:**

This screen will not display any quantities and locations if the system cannot place the inventory (e.g., if all available locations are full, frozen, etc.)

See [Creating and Maintaining Locations \(WLOC\)](#).

The system may update the item's primary location in the SKU table (the primary primary) depending on the setting of the Update Primary Primary Location for Item During Receiving (I35) system control value. See that system control value for more information.

Alphanumeric, 7 positions; required.

Screen Option	Procedure
Change a receipt location	Select Change for the location to change it.
Delete a receipt location	Select Delete for a location to delete it.
Override the warehouse	Select Override Whse to place the quantity in another warehouse. The system toggles between making the <i>Whs</i> field an enterable or display-only field.
Accept the locations	Select Accept to accept the locations and quantities for the item.
Reject the locations	Select Reject to reject the locations and quantities for the item. The Confirm Reject Request pop-up window opens, allowing you to confirm or cancel the reject request.

Instructions:

1. Review the system suggested locations if there are any.
2. Enter the number of items that you want to place in the *Qty* field.
3. In the *Location* field, enter the location code where the quantity will be placed. A valid warehouse location for the item must be entered. The following message indicates if the location is invalid: Location XXXXXXXX does not exist.
4. The Confirm Location Creation pop-up window opens if you enter a new primary location code for an item and the Allow Multiple Primary Item Locations (D12) system control value is set to CONFIRM. Select OK to accept the multiple primary location or select Exit to cancel.

5. To display a list of valid locations or to create a new temporary location in which to place the item, position the cursor on the *Location* field and prompt to display the [Select Location Screen](#).
6. To override the warehouse, select Override Whse to gain access to the *Warehouse* field where you can enter a new warehouse code for the placement. A valid warehouse for the item must be entered. The following message indicates if the warehouse is invalid:
`Warehouse XXX does not exist.`
7. Select OK. The system validates your entries and highlights any fields you need to correct. Correct the fields and select OK again. The system displays the quantity, warehouse and location at the bottom of the screen and increases the amount in the *Qty placed* field in the header of this screen.
8. Select Accept to accept the placements you have made. The system verifies that the total quantity placed equals the quantity received. The following message indicates if the quantities are not the same: `Total units placed must equal the amount requested.`
9. Select Reject to reject the placements for the item. The Confirm Reject Request pop-up window opens for you to confirm or cancel the reject request. The system returns you to previous screen.

Creating Temporary Locations at Receiving

Purpose: Use the [Create Temporary Location Screen](#) to create a temporary location in which to place the merchandise. Locations are used to identify where merchandise is stored in the warehouse. Temporary locations are used to place merchandise that you want recognized as received, before a permanent location is assigned.

A temporary location cannot exist without at least one item/location record associated with it. When stock is moved into a temporary location, the system creates an item/location record. When the on-hand in the item/location reaches zero, the system will delete the location and the item/location record.

Allocating stock: Order Administration will not allocate merchandise from a temporary location even if the location is defined as pickable. In order to allocate stock, you must move the merchandise to a non-temporary, pickable location.

Location codes identify a specific storage unit in the warehouse, and usually consist of a combination of the warehouse zone, aisle, shelf and bin number where the location is situated. The system provides two methods of defining your location codes:

- You can segregate your location codes into zone, aisle, shelf and bin identifiers with a separate field for each value. This method provides for inventory reporting by warehouse zone.
- You can define your location codes using one free-form field with each location code containing from one to seven characters. This method is used when your warehouse is not organized by zones, aisles, shelves and bins.

Select Location Screen

Purpose: Use this screen to review a list of existing locations. You can select the location where the merchandise will be placed from the list or you can create a temporary location for the placement.

How to display this screen: Position the cursor on the *Location* field and prompt on the [Work with P/O Receipt Detail Screen](#), or select Change on the [Work with P/O Receipt Detail Screen](#), then select Location on the [P/O Receipt Detail Screen](#) and click on the arrow in the *Location* field at the [Work with PO Receipt Locations Screen](#). Position the cursor on the *Location* field and prompt on the:

- [Work with P/O Receipt Detail Screen](#)
- [P/O Receipt Detail Screen](#)
- [Work with PO Receipt Locations Screen](#)

Screen Option	Procedure
Create a temporary location	Select Create Temp to advance to the Create Temporary Location Screen .

Create Temporary Location Screen

Purpose: Use this screen to create a temporary location for an item during Purchase Order Receipts. Temporary locations are used to place merchandise that you want recognized as received, before a permanent location is assigned.

[Streamlined Pick Slip Generation \(WSPS\)](#) will not allocate merchandise from temporary locations even if the location is defined as pickable. In order to allocate stock, you must move the merchandise to a non-temporary, pickable location. Temporary locations are deleted from the system when the quantity on-hand reaches zero.

How to display this screen: Select Create Temp on the [Select Location Screen](#).

Field	Description
Whs/desc (Warehouse/ description)	A code that identifies the warehouse where the location will be created. The code of the warehouse where the merchandise is being placed and the warehouse name display. <i>Numeric, 3 positions; display-only.</i>
Location	A user-defined code that represents a warehouse location where merchandise is stored. The warehouse location code can consist of a zone/aisle/shelf/bin combination, or it can be any user-defined code. The location code prints on pick slips and reports. See Creating and Maintaining Locations (WLOC).
Type	<i>Alphanumeric, 7 positions; required.</i> The location type, which determines whether inventory can be allocated from the location, whether the location is permanent or temporary, and whether merchandise will be replenished to or from the location. Only temporary locations can be created using this function. This field is set to T. <i>Alphanumeric, 1 position; display-only.</i>

Note:

If your warehouse locations consist of a warehouse zone, aisle, bin number and shelf number combination, separate fields are provided for these values. The zone/aisle/shelf/bin combination must still be entered in this field.

Field	Description
Zone	A user-defined code to identify the warehouse zone where the location is situated. Assigning zone codes provides for inventory analysis reporting by zone. Zone codes are also used to sort pick slips when the Cart Bin Picking method is used. <i>Alphanumeric, 1 position; optional.</i>
Aisle	A user-defined code to identify the warehouse aisle of the location. <i>Numeric, 2 positions; optional.</i>
Shelf	A user-defined code to identify the location's shelf number within the aisle. <i>Numeric, 2 positions; optional.</i>
Bin	A user-defined code to identify the location's bin number on the shelf. <i>Numeric, 2 positions; optional.</i>
Hang/flat	A code indicating how inventory is stored in the location. This code is informational only. • H = indicates that inventory in the location is hung. • F = indicates that inventory in the location is laid flat, or is stored in a conventional manner. • O = indicates that inventory is stored in the location in some other manner. <i>Alphanumeric, 1 position; required.</i>
Picking sequence	A user-defined sequence number which is used during Pick Slip Generation to determine the sort of the Batch Pick Sheet. When picking sequence numbers are not assigned, the system sorts the locations alphabetically by Location code. The picking sequence code is used by all pick slip generation methods. <i>Numeric, 7 positions; optional.</i>
Bar code #	A system generated sequence number assigned to the location when it is created. The sequence number prints in bar code format on the bin location labels. <i>Numeric, 7 positions; display-only.</i>
Fill factor	A user-defined percentage value that is used during Suggest Location Placement (MSLO) to determine when the location is stocked to capacity. The system evaluates the location capacity entered in the <i>cubic</i> field against the fill factor to determine location's true item capacity. Example: A location can be considered filled to capacity when 80% of its cubic volume is consumed because of the shape of the items that are stored in it. The cubic volume of a location may be 100 cubic feet, but can hold only eight items that are 10 cubic feet each because the items are spherical in shape.

 Note:

The system assumes the fill factor is 100% if this field is left blank.

Alphanumeric, 5 positions with 2-place decimal; optional.

Field	Description
Pickable location	A code indicating whether inventory can be picked from the location. - Selected - indicates that inventory can be picked from the location. - Unselected - indicates that inventory cannot be picked from the location. Bulk locations, or locations where defective merchandise is kept might be defined as non-pickable.
	 Note: Inventory Inquiry in Order Entry includes quantities in pickable locations only; all other inventory inquiries display pickable and non-pickable quantities.
Freeze	Indicates whether the location and its merchandise are frozen. Valid values are: - Selected = The location is frozen. - Unselected = The location is not frozen. If a location is frozen: - Pick Slip Generation ignores the location when determining where inventory should be picked to fulfill an order. See Performing Pick Slip Generation. - Suggest Location Placement (MSLO) ignores the location when suggesting where to place stock.
Stock type	A user-defined code that describes the type of merchandise that can be found in the location. Examples include DEF (Defective), or RTV (Return to Vendor). This field is informational only. <i>Alphanumeric, 3 positions; optional.</i>
Frequency code	A user-defined code that represents the frequency with which inventory is picked from the location. Informational only. <i>Alphanumeric, 1 position; optional.</i>
Class (Location class)	A user-defined code that identifies the type of merchandise that will be placed in the location. This code is used to restrict the placement of certain item types to specific locations. For example, if the location is defined as a 'Jewelry' location, only items that contain the item type code for 'Jewelry' can be placed in the location. The class code entered is validated against the Location Class table. See Creating and Maintaining Location Classes (WLCL).

 Note:

If this field is left blank, only items that have a blank location class can be stored in the location.

Alphanumeric, 2 positions; optional.

Field	Description
Capacity units	The total number of units that can fit in the location. <i>Numeric, 7 positions; optional.</i>
Capacity weight	The total weight the location can hold, expressed in whole pounds. <i>Numeric, 7 positions with a 3-place decimal; optional.</i>
Capacity: cubic	The total cubic volume of the location. The cubic volume can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in the <i>height</i> , <i>length</i> , <i>weight</i> , and <i>cubic</i> fields. The system calculates the cubic capacity if values are entered in the <i>height</i> , <i>length</i> , and <i>weight</i> fields.
 Note: The value in the <i>fill factor</i> field works in conjunction with this field.	
Dimensions: Height	<i>Numeric, 7 positions; optional.</i> The total height (the distance from the top to the bottom) of the location. The height can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in all <i>height</i> , <i>length</i> , <i>weight</i> , and <i>cubic</i> fields. <i>Numeric, 3 positions; optional.</i>
Dimensions: Length	The total length (the distance from one side to the other) of the location. The length can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in all <i>height</i> , <i>length</i> , <i>weight</i> , and <i>cubic</i> fields. <i>Numeric, 3 positions; optional.</i>
Dimensions: Width	The total width (the distance from the front to the back) of the location. The width can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in the <i>height</i> , <i>length</i> , <i>weight</i> , and <i>cubic</i> fields. <i>Numeric, 3 positions; optional.</i>
Comment	A user-defined comment about the location. <i>Alphanumeric, 20 positions; optional.</i>

Create PO Detail Standard Screen (Adding Lines To A Purchase Order)

Purpose: Item lines can be added to a purchase order during Purchase Order Receipts when a vendor ships you merchandise and you do not have an open quantity for the merchandise on the purchase order.

For example, a vendor may send the wrong color or size of an item, may send you merchandise that you did not order, or may send you the balance of an item after you forced the line complete.

By adding lines to the purchase order, you can record receipt of the merchandise for tracking purposes. You can then do any of the following:

- place the merchandise into suspense until you decide what to do with it.
- place the merchandise into inventory if you decide to keep it.
- place the merchandise in a non-reservable warehouse and process a return-to-vendor inventory transaction if you will be returning it to the vendor.

The [Add PO Detail Line during PO Receipts \(A21\)](#) secured feature controls whether this function can be used.

For more information: See [Maintaining Purchase Orders \(MPOE\)](#) for a complete description of the fields on this screen and step-by-step instructions on adding lines to a purchase order.

How to display this screen: Select Add Line at the [Work with P/O Receipt Detail Screen](#).

Printing Purchase Order Labels

Purpose: You can print bar-coded labels to identify the receipt quantity and the location where the merchandise is placed. Labels can be printed at the following times:

- during [Receiving Purchase Orders \(PORC\)](#) when the merchandise is being placed into inventory.
- when using Placing Suspended Stock (SUSP) to transfer merchandise from suspense to inventory.

Labels cannot be printed for merchandise being placed into suspense during Purchase Order Receipts.

The [Labels at PO Receipts \(C16\)](#) system control value determines whether the labels are printed. You can print one label for each item or you can print as many labels as you want. When you print multiple labels, the same quantity prints on each label.

The Print Labels window opens only when the [Labels at PO Receipts \(C16\)](#) system control value indicates to prompt for user-entry of label information. The window does not open if this value indicates to print only one label per receipt; one label automatically prints for each receipt or suspense transfer when the transaction is accepted.

Print Labels Window

Purpose: Use this window to enter the number of labels you want to print and the item quantity to print on each label. When the window opens, a quantity of 1 defaults in the *Number of labels* field and the quantity being placed in the location is indicated in the *Quantity per label* field. You can change this information if necessary.



Note:

If you are placing the merchandise in more than one location, this window opens for each location where you are placing the item.

How to display this window:

- Select Accept at the [Work with P/O Receipt Detail Screen](#) when using the Receive Purchase Orders function.
- Select Accept at the Suspense Placement By Item Screen, Suspense Placement By PO Screen, or [Suspense Placement By PO Control # Screen](#) when using the Place Suspended Stock function.

Field	Description
# of labels	The number of labels you want to print for the item/location. Up to 999 labels can be printed per location. You must print at least one label. <i>Numeric, 3 positions; required.</i>
Qty per label	The number of units you want to print on each label for the item/location. The quantity you enter does not have to be the same as the receipt or transfer quantity; you can enter any quantity to print on the label. When printing multiple labels for an item/location, the quantity entered will print on each label. <i>Numeric, 7 positions; required.</i>

Instructions:

1. Review the default *# of labels* and *Qty per label*. Change the information if necessary, using the steps described below.
2. Enter the number of labels you want to print for the item/ location in the *# of labels* field.
3. Enter the item quantity to print on each label in the *Qty per label* field.
4. Select OK to accept your entries. The Print Labels window opens for the next item.

Display Prior P/O Receipts Screen

Purpose: This screen lets you view all previous receipts for a purchase order line during Purchase Order Receipts, if the line is open. Each receipt for line can be viewed.

The following information is displayed for each receipt:

- P/O #
- Control#
- Vendor #
- Vendor name
- Line #
- Item/SKU
- Receipt quantity
- Placement type
- Receipt date
- Currency rate
- Customs date

How to display this screen: Select Prior Receipts for a purchase order line on the [Work with P/O Receipt Detail Screen](#).

Field	Description
Received	The date the items were received. When you enter a date all items received on or after the date entered display in ascending order by date. <i>Numeric, 6 positions; optional.</i>

Field	Description
Qty	The quantity of the Item/SKU (in retailer's unit of measure) that was received on the date shown in the previous field. <i>Numeric, 7 positions; display-only.</i>
Cost	The receiving cost of the Item/SKU for the receipt shown. <i>Numeric, 13 positions with a 4-place decimal; display-only.</i>
Type	A description indicating whether the items were received into inventory or into suspense. Valid values are: - Whse/Location = indicates the receipt was placed into inventory. - Suspense = indicates the receipt was placed into suspense. <i>Display-only.</i>
Control#	A number assigned to a group of Purchase Orders during Purchase Order Receipts to batch multiple purchase orders together. When you enter a control number, only receipts with that control number display. <i>Numeric, 6 positions; optional.</i>

Screen Option	Procedure
View receipt details	Select Display for the receipt to advance to the Display P/O Receipts Screen .

Display P/O Receipts Screen

Purpose: This screen displays the detail information for the selected receipt. The receipt date, quantity received, placement type (inventory or suspense), currency rate, and customs date for the receipt are shown.

How to display this screen: Select Display for a receipt on the [Display Prior P/O Receipts Screen](#).

Field	Description
Control #	A number assigned to a group of purchase orders during Purchase Order Receipts to batch multiple purchase orders together. The control number indicates the batch in which the receipt was posted. <i>Numeric, 6 positions; display-only.</i>
PO #	The number of the purchase order you are working with. <i>Numeric, 7 positions; display-only.</i>
Vendor	The number of the vendor from whom the items on the purchase order were purchased. <i>Numeric, 7 positions; display-only.</i>
Line #	The purchase order line number the receipt was posted against. <i>Numeric, 3 positions; display-only.</i>
Item	The item number/SKU that was received. <i>(Item #): Alphanumeric, 12 positions; display-only.</i> <i>(SKU): Alphanumeric; 4 positions each; display-only.</i>

Field	Description
Receipt	The number of units of the item received. <i>Numeric, 7 positions; display-only.</i>
Whse/Location	The description WHSE/LOCATION indicates the receipt was placed into inventory. <i>Alphanumeric, 13 positions; display-only.</i>
Suspense	The description SUSPENSE indicates the receipt was placed into inventory. <i>Alphanumeric, 13 positions; display-only.</i>
Receipt Date	The date the merchandise was received. <i>Numeric, 6 positions; display-only.</i>
Currency Rate	The currency exchange rate at which the merchandise was received. The cost at receiving are calculated using the converted rate. <i>Numeric, 11 positions with a 7-place decimal; display-only.</i>

Work with PO Messages Screen

Purpose: Use this screen to add, view or change messages that apply to the entire purchase order. Messages that were entered using the Enter/Maintain POs function can be viewed or changed during Purchase Order Receipts. In addition, new messages can be added during Purchase Order Receipts.

Optionally, you can print any of the messages on the purchase order form and the receiver's worksheet.

How to display this screen: Select Messages at the [Work with P/O Receipt Detail Screen](#) or select P/O Messages at the [P/O Receipt Detail Screen](#).

Field	Description
Message	The message text for this purchase order. Previously entered messages display when you access the screen. Additional lines are available to enter new messages. Select Next to view additional messages or to access additional lines. <i>Alphanumeric, 60 positions each line; optional.</i>
Print	Indicates whether this message text will print, and the form on which it will print. You can choose to print none, some, or all message lines, and you can also define the forms on which each line will print. The valid values are: • Blank = Do not print • Print on Both = Print on both the purchase order and the receiver's worksheet • Print on PO = Print on purchase order only • Print on RCV Worksheet = Print on receiver's worksheet only <i>Optional.</i>

Adding a new message:

1. Enter the information you want on the first available line in the message section.
2. Use Tab to move to or click on the *Print* field. Enter a print code, if applicable.
3. When you finish the note, select OK. The system accepts the entry.

Changing a message:

1. Select Add/Change. The existing messages can now be changed.
2. Make the changes and select OK. The system accepts the entry.

Work with P/O Detail Messages Screen

Purpose: Messages that apply to an item on an individual purchase order line can be added, changed or viewed during Purchase Order Receipts. Optionally, you can print any of the messages on the purchase order form and the receiver's worksheet.

Messages can also be entered, changed, or viewed using the Maintain PO's function. See Maintaining Purchase Orders (MPOE).

How to display this screen: Select Messages for an item at the [Work with P/O Receipt Detail Screen](#) or select P/O Messages at the [P/O Receipt Detail Screen](#).

Field	Description
Message	The message text for this purchase order detail line. Previously entered messages display when you access the screen. Additional lines are available to enter new messages. Select Next to view additional messages or to access additional lines. <i>Alphanumeric, 60 positions each line; optional.</i>
Print	Indicates whether this message text will print, and the form on which it will print. You can choose to print none, some, or all message lines, and you can also define the forms on which each line will print. The valid values are: • Blank = Do not print • Print on Both = Print on both the purchase order and the receiver's worksheet • Print on PO = Print on purchase order only • Print on RCV Worksheet = Print on receiver's worksheet only <i>Optional.</i>

Adding a new line message:

1. Enter the information you want on the first available line in the message section.
2. Use Tab to move to or click on the *Print* field. Enter a print code, if applicable.
3. When you finish the note, select OK. The system accepts the entry.

Changing a line message:

1. Select Add/Change. The existing messages can now be changed.
2. Enter the changes as needed. The system accepts the entry.

Closing the Purchase Order

Closing PO lines: When the total quantity due on a line is received, or if the quantity received is within the *Under receipt %* tolerance limit from the System Control table, the purchase order line is closed. When all lines on a purchase order are closed, the purchase order is closed.

You cannot reopen a purchase order line that is closed. You can add a line to the purchase order during receiving if the vendor ships additional merchandise. For example, if a vendor short-ships an item, and the received quantity is within the Under Receipt % (A62), the purchase order line will be closed when the receipt is accepted. If the vendor subsequently ships the remaining balance, a new line must be added to the purchase order to record the

additional receipt. See [Create PO Detail Standard Screen \(Adding Lines To A Purchase Order\)](#).

Closing the PO: When all lines on the purchase order are closed, the purchase order is closed. Closed purchase orders cannot be reopened during Receiving. You can reopen a closed purchase order with Maintaining Purchase Orders (MPOE).

Selecting Purchase Orders for Receipt (PORC)

Purpose: Use the Select Purchase Order For Receipt screens to enter or scan for the purchase order you are receiving. If you know information unique to the purchase order, such as its number, you can enter the number and advance directly to purchase order receiving. If you do not know the number of the purchase order, you can search for the purchase order using any of the following search criteria:

- Due date
- Reference #
- Vendor #
- Vendor name
- Vendor reference #
- Vendor item #
- Item/SKU
- Item alias
- Buyer code

Additionally, you can simply select OK at the [Select P/O For Receipt Screen](#) to display each purchase order available for receipt.

Select P/O For Receipt Screen

Purpose: Use this screen to select the particular purchase order you are receiving. You can enter the purchase order number to advance directly to the [Work with P/O Receipt Detail Screen](#), or enter information in any of the fields on the screen to display a list of purchase orders.

How to display this screen: Enter PORC in the *Fast Path* field at the top of any menu.

Scanning for purchase orders: You can use the fields on this screen to find the purchase order you want to work with.

Note that the fields are grouped, and some fields are indented under the heading for the group. You can scan in the following combinations:

- Within a group, you can enter as much data to scan on as you want. For instance, you can enter data in the *Vendor name*, *Reference* and *Item* fields.
- You cannot scan on multiple fields from different groups, except that you can always scan on the *Buyer* field plus any other group.

Field	Description
Control #	The purchase order receipt control number. This number can be the number assigned to a purchase order when you docked it. See Docking Purchase Orders. If the Cross company scan field is selected for your company and you enter a control number from another company, the system makes the company associated with the control number the active company. <i>Numeric, 6 positions; may be display-only or optional.</i>
Purchase order information:	Purchase order information:
PO #	The number assigned to a purchase order. <i>Numeric, 7 positions; optional.</i>
Due date	The date this purchase order is due to be received, based on the purchase order date and the lead days from the Vendor/Item record or a user-defined date. <i>Numeric, 6 positions (user date format); optional.</i>
Reference #	An internal reference number associated with the purchase order. For example, the reference number may represent an internal purchase order number from a pre-printed purchase order or an internal control for departmental purchase orders. <i>Alphanumeric, 15 positions; optional.</i>
Vendor information:	Vendor information:
Vendor	A user-defined code to identify the supplier of an item. See Working with Vendors (WVEN). <i>Numeric, 7 positions; optional.</i>
Name	The name of one of your suppliers, identified on the system by a vendor number. Enter a full or partial vendor name to display a pop-up window listing each vendor name, number, and number of open purchase orders, beginning with the name you entered. You can select a vendor from the list by entering 1 next to the name. <i>Alphanumeric, 30 positions; optional.</i>
Reference	The vendor's internal reference number for the purchase order; for example, the vendor's order number. <i>Alphanumeric, 15 positions; optional.</i>
Item	The vendor's code for the item. See Working with Vendor Items (WVNI). <i>Alphanumeric, 20 positions; optional.</i>
Your item code information:	Your item code information:
Item/SKU	A code that represents a unit of inventory, and any information on the item's unique characteristics, such as its color or size. <i>(Item) Alphanumeric, 12 positions; optional.</i> <i>(SKU) Alphanumeric, three 4-position fields; optional.</i>

Field	Description
Alias	The substitute item code for an actual item code on your system. No on-hand inventory levels are maintained for the alias item code. You may offer an item through both alias and the true item code in the same catalog to determine the effect of an item's location and placement on sales. See the Work with Alias Screen. <i>Alphanumeric, 12 positions; optional.</i>
Your authorized buyer: Buyer	Your authorized buyer: A code that identifies the employee who requested the purchase. See Working with Buyers (WBUY). <i>Alphanumeric, 3 positions; optional.</i>