Oracle® Retail Store Operations Cloud Service

User Guide

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Preface

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

Audience

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

Documentation Accessibility

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Related Documents

For more information, see the following documents in the Oracle Retail Store Operations Cloud Service documentation set:

- *Oracle Retail Store Inventory Operations Cloud Services Release Notes*
- *Oracle Retail Store Inventory Operations Cloud Services Implementation Guide*
- *Oracle Retail Store Inventory Operations Cloud Services Data Model*
- *Oracle Retail Enterprise Inventory Cloud Service Security Guide*
- *Oracle Retail Enterprise Inventory Cloud Service Administration Guide*
- *Oracle Retail Enterprise Inventory Cloud Service Inbound and Outbound Integration Guide*
- *Oracle Retail Enterprise Inventory Cloud Service User Guide*
- *Oracle Retail Store Operations Cloud Service Mobile Guide*

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Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
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1

Introduction

This chapter provides a functional introduction to Store Operations Cloud Service (SOCS).

Overview

SOCS is a cloud service mobile UI which requires Enterprise Inventory Cloud Service (EICS) as a pre-requisite. It executes operational inventory transactions related to a store.

The application uses Oracle's Mobile Application Platform (MAF), a browser based Oracle JET desktop and for quick execution processes, JET Mobile.

The MAF UI is intended to be deployed on iOS, Android, and Windows 10 mobile units, be it a handheld scanner or a tablet. SOCS supports the following functions:

- Scanning of barcodes (GS1, VPN, item, UIN, container ID) or waving an RFID wand to identify a SKU or container
- Container, item, and supplier lookup
- Inventory adjustment with appropriate reason codes
- Direct Store Deliveries with Purchase order (PO), without PO and against an ASN
- Store Ordering
- Creating, accepting, picking, and rejecting transfer requests
- Accepting Return to Vendor (RTV) request, creating RTVs and shipping to a vendor
- Shipping to another warehouse, store, or external finisher
- Receiving from warehouse, store, or external finisher
- In Store Replenishment from backroom to shop floor
- Management of inventory on delivery bay, shop floor and backroom
- Adhoc, unit, problem line and unit and amount Stock counts
- Customer order pick, pack, and ship
- Item Basket
- Serialized inventory tracking
- Capturing customer extended attributes at serial, item, and transaction levels
- Ticket printing

The JET Mobile UI is focused on fast and simplified execution of several transactions and faster navigation. This app will only run natively on Android O/S devices, but can also be accessed as a web browser application. It supports the following processes:

- Inventory Adjustments with appropriate reason codes, and quick adjustments
- Stock Counts (Ad Hoc, unit count, problem line and unit and amount and quick count)
- Transfer request, transfer document, transfer shipment, transfer receiving and quick count. It also has a specified dialogue for quick container receiving

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- Store Orders and Quick Store Orders
- Direct Store Deliveries and Return to Vendor
- Scanning of barcodes (GS1, VPN, SKU) to identify an item
- Extended Item Lookup with simplified inventory adjustments and ticket print
- Supplier Lookup, Container Lookup
- Quick Customer Orders: Accept/reject, pick, delivery and curb side pickup
- Native scanning is possible with supported Honeywell or Zebra device using the Android specific application.
- Item Maintenance
- Ticket Printing
- In store Replenishment
- Manage location inventory
- Item Basket

The JET Mobile, EICS and MAF applications can be run together. This allows the retailer to decide if they want to use the quick and simplified processes on the JET Mobile application in conjunction with the MAF client, for those whose process has not yet been converted over.

Business Value

This section describes the business values of using SOCS.

Improved Customer Satisfaction

SOCS allows a user to execute store inventory transactions and provide inventory positions to a customer across multiple stores. This means that no time is required to walk over to a fixed station since anyone with a mobile unit can answer inventory and location positions of an item in the store. It is even possible to look up inventory in other stores within the same workflow.

Real-Time Inventory

SOCS sources its data from a centralized point which is continuously updated with sales, receipt, shipping, and adjustment data. This allows for a real-time cross enterprise inventory view.

Streamlined Inventory Processes

All the processes in the SOCS UI follow a similar pattern which means that learning to operate a single workflow allows a user to intuitively and quickly learn how to operate other workflows.

Assisted Inventory Ordering

Some items require real time ordering review with up to date inventory positions to ensure a sufficient supply of inventory is available for customers. This is especially important for highly volatile selling items like fresh. SOCS supports this process through importing replenishment pre-generated orders and the creation of ad hoc orders based on accurate store inventory.

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To make ordering easier, SOCS provides inventory information about last ordered quantity, inventory positions in the backroom and shop floor, days of supply, but also allows the user to review forecasted sales data from the planning applications.

Improved Corporate Control

SOCS can be configured using over 400 permissions and configurations. It is for example possible to restrict the UI from manual entering quantities or receiving processes can be configured to require a secondary person to approve the receipt.

Additional tracking features have been built out to help corporate or store managers to validate compliancy through several dashboards:

- When leveraging GS1 databar functionality (manual or automatic through the databar), expiration dates and lot numbers can be tracked and through EICS we can evaluate which items have an expiration date.
- When printing tickets a log is created for all tickets that have been printed.
- A dashboard exists to enable a user to see which stock counts need to be authorized across a region.
- A store shipping network function allows retailers to control which store locations a store can ship to or request inventory from beyond generic transfer zones that can be setup at corporate.

Full Transaction Views

The SOCS UI does not only serve as a mechanism to scan items and record them against transactions, but it also serves as a management application by allowing managers to look up transactions, view item lists and even edit or change (within a time frame) receipts.

Enhanced Inventory Tracking

Two features inside of SOCS allow the user improved inventory tracking.

Serialization tracks each individual item instance, and SOCS allows the user to track each item instance in any physical transaction flow like shipping and receiving, inventory adjustments, stock counts. This improved tracking increases security on high value items as each time a user touches the item a record is made of the transaction.

RFID real time streaming integration allows for accurate location level inventory. This allows a sales associate to quickly look up where an item is located and have confidence that the RFID tracked information is accurate and up to date when serving a customer. In addition to the real time streaming from a third party system, SOCS also has the ability to execute stock counts with RFID items.

Custom Flexible Attributes

SOCS allows the retailer to capture custom defined attributes at three levels:

- **Transactional**

  The retailer can define by transaction type what can be captured and if the new custom information is required to be captured or not.

- **Item**

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By leveraging the GS1 databar, retailers can define by subclass up to 10 attributes that can be captured automatically or manual at the item level. This for example can be leveraged to capture lot numbers, expiration dates.

- **UIN**

  The Item scan number feature allows the user to capture additional attributes for each UIN. This function is reserved for the Jet client at this point, but it does allow in SOCS to identify a single item instance with more than 1 scannable barcode. This is ideal for composite items with multiple unique identifiers for the same item as a computer with a hard drive, or a cellphone.

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2

Common Usability and Navigation

This chapter describes the method by which you log in, and log out, and navigate. It also describes the common User Interface (UI) controls that are used throughout the mobile UI.

This Chapter is divided into the following sections:

- Common Usability and Navigation MAF Mobile
- Common Usability and Navigation JET Mobile

Common Usability and Navigation MAF Mobile

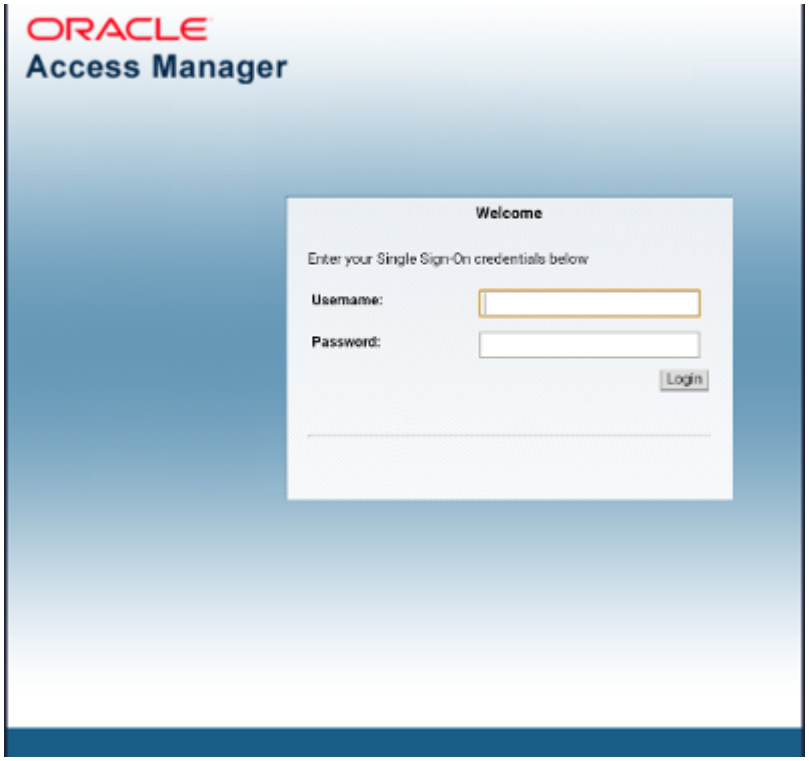
MAF Mobile UI features:

- Welcome / Login
- Menu/Drawer
- Store List
- Language
- Scan Type
- Scan Mode
- Unit of Measure
- Numeric Entry
- Filter Bar
- Scan Bar
- Search Criteria
- Item Image and Item Description
- Print
- Print Tickets
- Select Printer
- Notes
- Reset, Remove, and Restore Item
- Item Detail - UIN
- Item Detail - Attributes
- Item Detail - Scan Details
- Configure Endpoints
- Scanner Configuration

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Welcome / Login

Figure 2-1 Welcome Screen



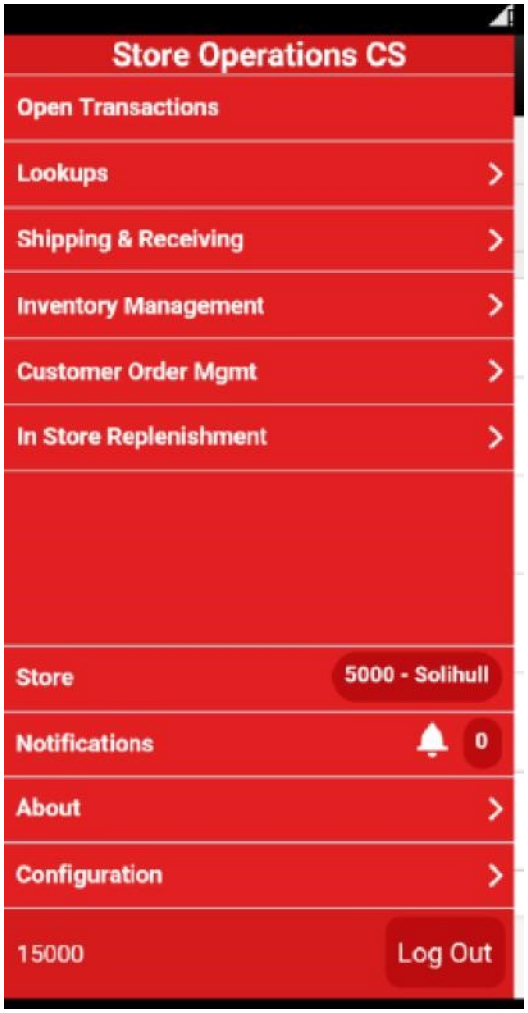
Upon launching the mobile UI application, the login screen is displayed. The first time a user logs into the system, if logon is successful, the system will log in to the user's first assigned store. The system will remember the store the user was last logged into and log in to that store until the store is changed. Upon successful login, the system will navigate you to the Open Transactions dialog.

The user will remain logged in until choosing to logout. On Windows devices, the user will be presented with an alert that their session is about to expire, “Your sessions is about to expire. Please save your work and logout”. This alert will display after being logged in for <x> minutes, where <x> is defined as the Retail Window Session Warning in the ADF property configuration file.

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Menu/Drawer

Figure 2-2 Menu/Drawer

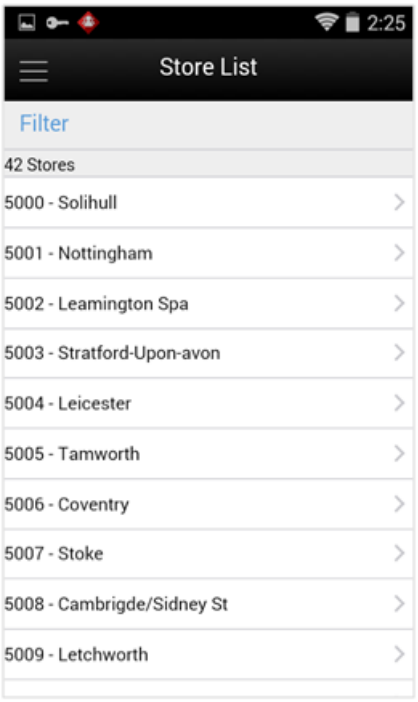


The mobile drawer is displayed as the menu panel on the left side of the screen upon tapping the drawer (hamburger stack which looks like three horizontal lines in the upper left-hand corner of the application). From the menu/drawer, you have access to various functionality of the application.

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Store List

Figure 2-3 Store List



The change stores function is available from the drawer/menu by tapping the store option. You are directed to the store list screen with an option to change stores.

The store list displays all the stores that the user is authorized for. If needed, the user can search for a store by either the store ID or store name. The store list is narrowed down based upon the search. Selecting a store will display the new store in the store field of the drawer/menu as well as in the footer on **Open Transactions**. The user is then officially logged in to the new store. All data and transactions will be for the newly selected store. Every time the user logs in to the system, it will be for the store selected until a new store is selected. The system remembers/saves the store for the user.

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Language

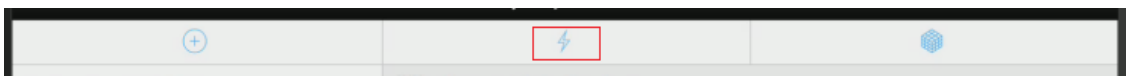
Figure 2-4 Language



The **Language** screen is displayed by selecting the **Language** menu option within **Configurations** from the drawer/menu. Initially when a user is logging into the mobile for the first time ever, it will use the language of the device. The **Language** screen will display with a list of the available languages supported in the system. User selects a language, and the language will change in the application to the language selected and user will navigate to the **Open Transactions**. That language will remain for the user (saved on the user) until the user change languages. The locale of the device (date format, currency format, and so on) will remain that of the device.

Scan Type

Figure 2-5 Select Scan Type



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The **Scan Type** is a found in the mode bar. It is used whenever an item can be entered or scanned within a Scan Bar. The scan type allows you to tell the system what type of item or barcode is being entered.

The values for this include **Auto** which is represented by a lightning bolt, **Bulk** represented by a cube (user must have proper permissions), and **UIN** which is a barcode.

Auto is the default value when logging into the system. **Auto** assumes that you can enter or scan any of the supported barcode types such as SKU, type 2, UPC E, GS1, and so on, and the system will parse through the various algorithms to derive the item.

Bulk allows the user to bulk scan or enter one to many items within a bulk dialog and then apply them to the transaction and validate them all at once. An example would be doing a wave of multiple RFID items.

The final option of **UIN**, assumes that the user will enter in a serial number or AGSN and therefore the system will only run the algorithm to search for UINs. Scanning a UIN as part of the UIN option will be much faster and potentially be more accurate in case of overlapping UIN numbers.

Scan Mode

Figure 2-6 Select Scan Mode

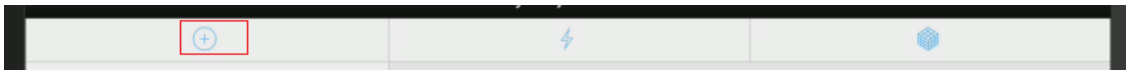


Figure 2-7 Scan Mode



The **Scan** mode is a found in the mode bar. It is used whenever an item can be entered or scanned, and the quantity is captured. The scan mode defines if the quantity from the barcode should be:

- Added to the existing item quantity, indicated by Increase with a plus icon.
- Removed from the exiting quantity indicated by reduce with a minus sign.
- No change to the quantity, which is review mode represented by a barcode.

The default scan mode is set to **Increase**.

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Unit of Measure

Figure 2-8 Select Unit of Measure

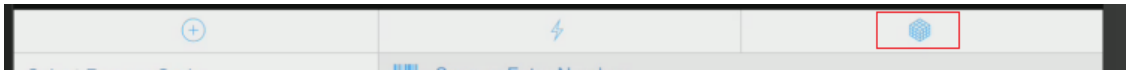


Figure 2-9 Unit of Measure



The **Unit of Measure** selection is a found in the mode bar. It is used whenever a quantity is captured. The unit of measure defines if the quantity displayed is going to be represented in the item's standard unit of measure, cases, or transaction unit of measure.

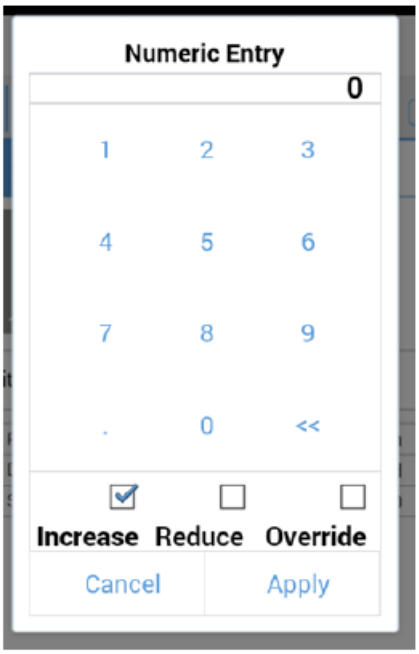
When switching the Unit of Measure, the quantity on the screen will convert to that unit of measure. When first logging in, the default unit of measure will be set based upon the system configuration **Default Unit of Measure**. The Unit of Measure selected by the user will be displayed in the mode bar, and the selected UOM will remain as the UOM until the user logs out of the application.

Transaction Unit of Measure will only be used where applicable which is in Customer Orders as well as Shipping and Receiving for a Customer Order. If Transaction UOM is selected in dialogs where it is not applicable, the system will use the Standard Unit of Measure even though the Transaction UOM may be selected.

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Numeric Entry

Figure 2-10 Numeric Entry



The **Numeric Entry** popup is used whenever there is an editable numeric field such as an item quantity field. The quantity that gets entered into the **Numeric Entry** popup will increase, reduce, or override the existing quantity on the screen. The mode on the **Numeric Entry** will be defaulted the system setting, **Manual Quantity Entry Default Mode**. When set to **Scan Mode,** the **Numeric Entry** popup defaults based upon what the **Scan Mode** is set to. When set to **Override** the default will be **Override**. In all cases, these are only defaults, and the user can always change mode of the **Numeric Entry**.

Examples:

- Qty = 15, enter in 3 increase, Qty = 18

  There is a quantity of 15 on the UI. In the popup, the user enters a quantity of three, selects the increase option, and apply. The new quantity is 18.

- Qty = 15, enter in 3 reduce, Qty = 12

  There is a quantity of 15. In the popup, the user enters a quantity of three, selects the reduce option, and apply. The new quantity is 12.

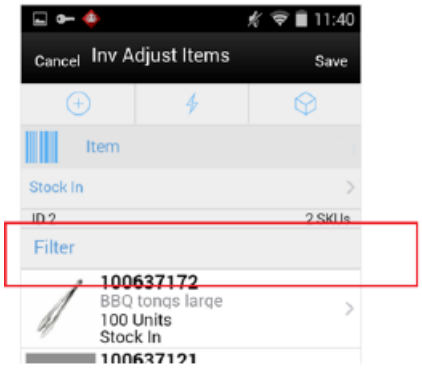
- Qty = 15, enter in 3 override, Qty = 3

  There is a quantity of 15. In the popup, the user enters a quantity of three, selects override, and apply. The new quantity is three.

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Filter Bar

Figure 2-11 Filter Bar



The **Filter** bar is used to narrow down a list of things such as items, containers, child stock counts, and so on.

You can tap and type into the filter bar or tap and scan into a filter bar. By default, the **Filter** bar will be displayed on the top of the list. When scrolling down in the list, the filter bar disappears, and it reappears when scrolling back up in the list. The criteria that a user can filter on will be unique per functional area. For example, inventory adjustments the user can filter on Item ID, Item Description, reason code, and UOM. The search is not case sensitive. The filter can be cleared out to return the full list. The filter will retain the entered criteria until leaving the screen in which it will be cleared out.

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Scan Bar

Figure 2-12 Scan Bar

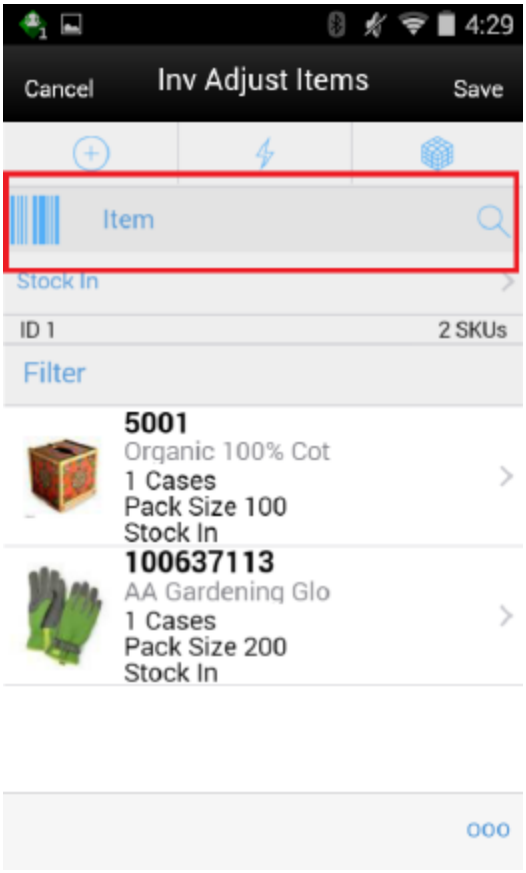
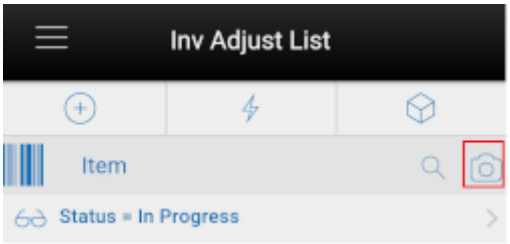


Figure 2-13 Scan Bar Camera



The scan bar is at the top of the transaction lists, Item Lists, other lists such as Child Count and Container Lists, and Item Detail screens. It will be anywhere an item, or some other attribute can be entered or scanned to be viewed or edited on a transaction.

This bar allows for one defined attribute to be scanned and that attribute will be stated in the text of the bar. For example: Item, Container or Customer Order ID.

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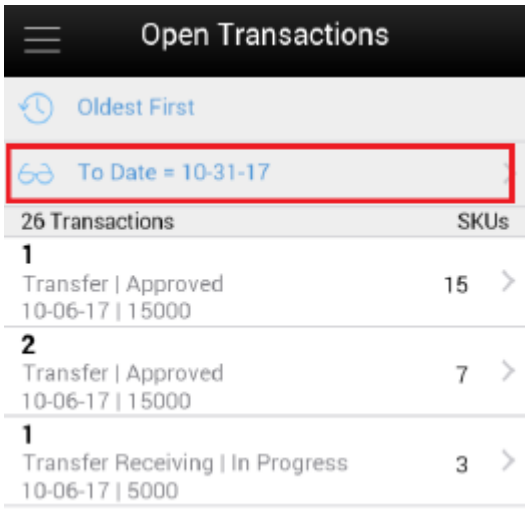
In the Transaction List screens, the scan bar will further filter or funnel down the list of transactions when doing a scan. The scanned attribute will be added in addition to the existing search criteria. It will appear in the search criteria, eye glasses field.

In other areas such as lists, item lists, container lists, as well as Item Detail, and soon, the scan bar will go to the details for what was scanned. Quantity may be updated, and the item may be added to the transaction depending on functionality.

If the system configuration **Enable Device Camera Barcode Scan** is set to **Yes**, then if a camera is detected on the device, the camera icon will be available. The camera icon will allow for scanning in the barcode via the camera on the device. The barcode will be parsed and processed the same as if the scanner was utilized.

Search Criteria

Figure 2-14 Search Criteria



The **Search Criteria** field is represented by an eye glasses icon in the header of the screen. Search criteria will be found on all transaction list screens, such as Inv Adjust List shown in this figure. Criteria will be listed. If there is more than one criteria, they will be separated by a pipe symbol. Initially when entering the dialog, the default search criteria for the functional area will be displayed. For example: in inventory adjustments it would show: Status = In Progress. If there are no default search criteria, the eye glasses will be displayed and the words **Search Criteria** will be listed.

Tapping the **Search Criteria** field, eye glasses, will navigate to the **Search Criteria** screen to select and or change criteria to search with. The search criteria field gets updated with the newly selected search criteria fields from the **Search Criteria** screen. When leaving the dialog, the search criteria will be reset back to the default search criteria.

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Item Image and Item Description

Figure 2-15 Item Detail Item Image



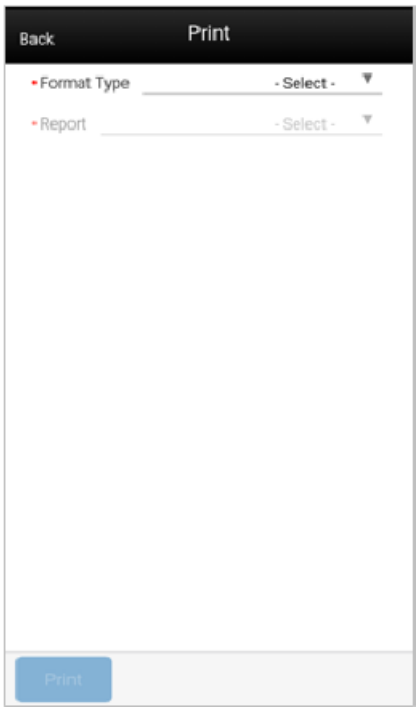
The item image is displayed throughout the application wherever an item is displayed. The item image will be displayed next to the Item ID and Item Description in all applicable screens. Each functional area has a parameter called Display Item Image. If it is set to **Yes**, the image will be displayed in that functional dialog. If it is set to **No**, the image will not be displayed.

The Item Description will display with the first line displaying the short or long description based upon as system configuration. The second line will display the diffs, diff1, diff2, diff3, diff4. If there are no diffs for the item, the second line will be blank. The second line is also displayed per a system configuration.

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Print

Figure 2-16 Print



The **Print** dialog is accessed when selecting print within the application. It is available when selecting **Print** from the footer menu within a transaction.

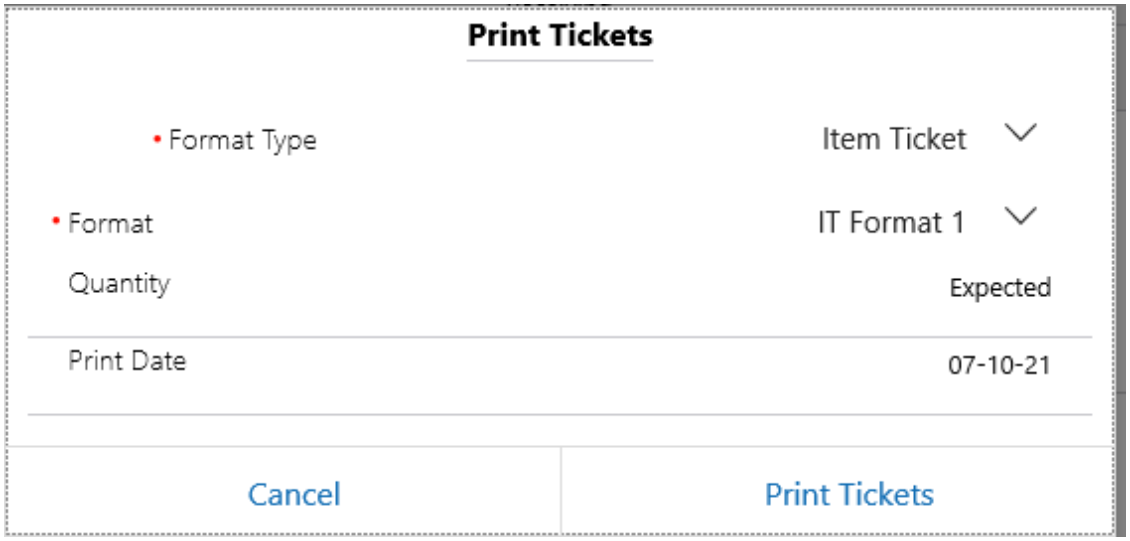
The transaction format type or types that are applicable to the functional area will be available for selection. For example, in Customer Order Deliveries, there may be format types of Customer Order Delivery and BOL. If there is only one applicable format type for the functional area it will be defaulted.

Once a format type is selected, the system will list all the reports that are available to print for that format type. The report will default based upon the default format type. The user can choose to select a different report format to print if other report formats exist for this format type transaction. Once print has been selected for the report, the PDF is retrieved based upon the report format.

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Print Tickets

Figure 2-17 Print Tickets



The **Print Tickets** dialog is accessed by the user to print the tickets for the container items. This dialog can be accessed by selecting the **Print Tickets** option from the footer menu.

The Print Tickets dialog is available on the following transactions container items screen both via transaction and lookup.

- Direct Store Delivery
- Transfer Receiving
- Transfer Shipment

The system displays the following attributes for the user to select.

Format Type: This allows the user to select the format type. Item Ticket or Shelf Label. Default -Item Ticket.

Format: This will show the list of formats available for the selected format type for the user to select to which format the tickets should be assigned. Default format assigned for the selected format type will be shown as selected by default.

Quantity: This field indicates the quantity populated depending on the transaction and status. This is a read only field.

Values: Shipped, Received or Expected.

In case of Shelf Label, the quantity is 'Label Quantity or 1'.

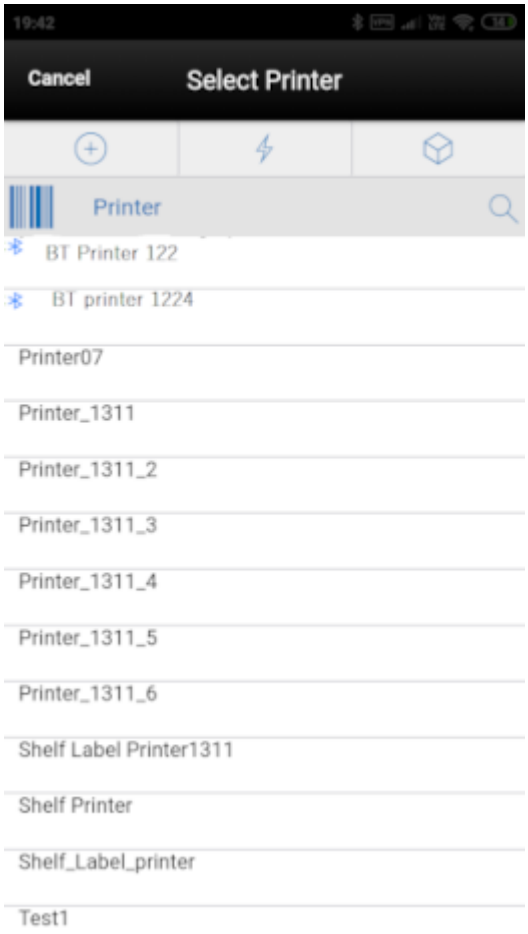
Print Date: This field indicates the print date. This is a read only field.

When the user selects to print, the system displays the **Select Printer** screen for the user to select the printer to which the tickets need to be submitted to print.

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Select Printer

Figure 2-18 Select Printer



On this screen the user can select the printer to set for the ticket printing.

On the top of the lists the system displays the paired Bluetooth printers.

The Bluetooth printers are indicated with the Bluetooth symbol and prefix 'BT' and these printers cannot be scanned.

This screen is for the user to select or scan the barcode of the printer and submit the tickets for printing.

This screen is accessed from the **Select Printer** option on the Auto Print Item, Manual Print Item screens and Print Tickets popup that appears when printing tickets from the container items screen.

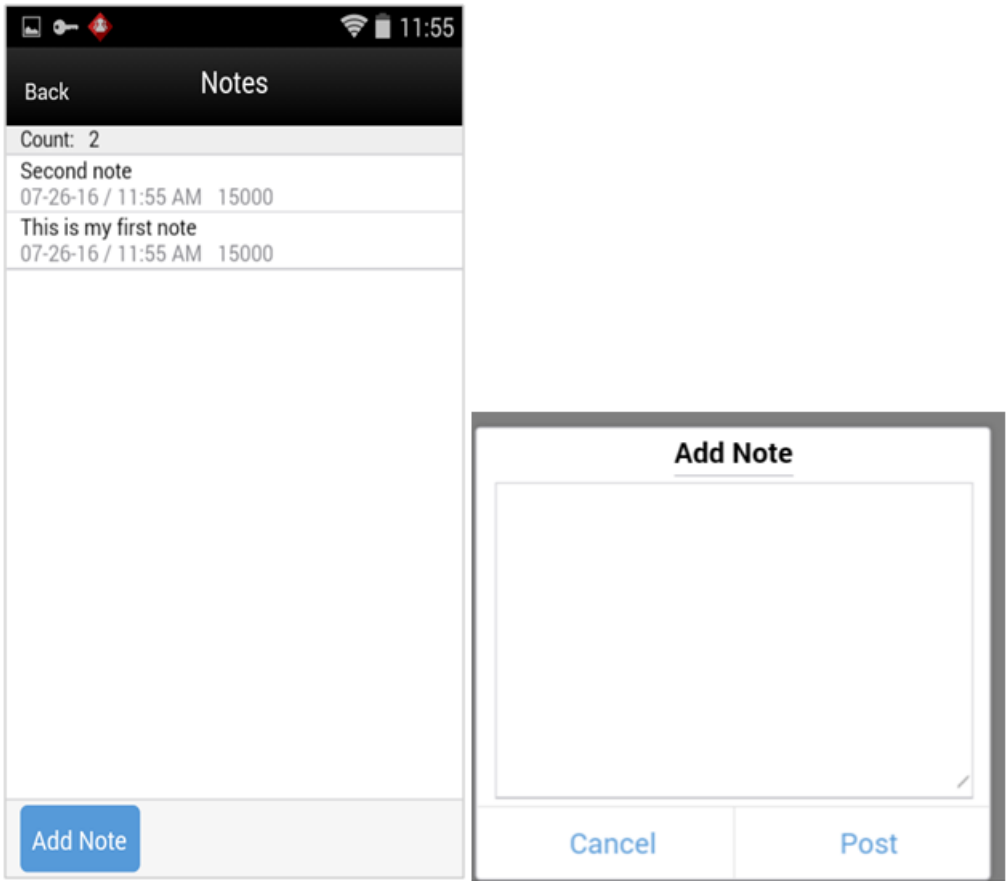
This screen lists all the printers that are available in the system for the item tickets and label type.

The selected printer is displayed on the Auto Print Item and Manual Print Item screens for the user to know to which printer the tickets/labels are submitted for printing.

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Notes

Figure 2-19 Notes



The Notes function is used to capture one or more notes about the transaction. It also allows you to view history or a trail of notes for a transaction. It is an optional process. The notes feature will be accessed from the footer menu within a transaction using the **Notes** menu option. Notes is available from within all transactions.

To add a note, select the **Add Note** button. The **Add Note** popup displays. Enter the note and then select **Post**. The note will be posted to the top of the list of notes in the Notes dialog. All notes will be listed in read-only mode with the user who created them and the creation date. Notes will always be available, and the user will always be able to add notes regardless of the transaction status. The user must have **Create Notes** permission to add notes.

Reset, Remove, and Restore Item

Within the footer menu (ellipsis) on most Item Detail screens will be options for **Reset**, **Remove**, and **Restore**. **Remove** and **Restore** are also displayed on most list of items screens, that is, Inv Adjust Items.

Reset will take all changes that have been made during the session and "undo" them back to the way the item was prior to entering the session. This option is only available for items that were added before the current session and only applicable to items where updates can be made to the item.

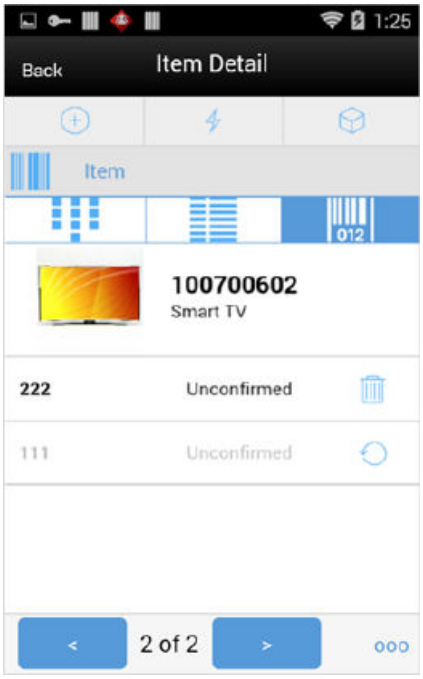
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Remove will allow for the removal of the item from the transaction. After selecting **Remove** the item will remain on the transaction, however it will be grayed out/disabled and changes cannot be made to the item. The item will remain on the transaction until it is saved/completed, which at that time the item will be deleted from the transaction.

Once an item has been marked for removal a **Restore** option will be available. **Restore** item allows for an item that is marked for removal to be unmarked. It will no longer be grayed out and the user will be able to edit the item where applicable.

Item Detail - UIN

Figure 2-20 Item Detail - UIN



The UIN tab will be accessible from Item Detail screen from within a transaction. The system must be configured for UINs and the item must be a UIN item.

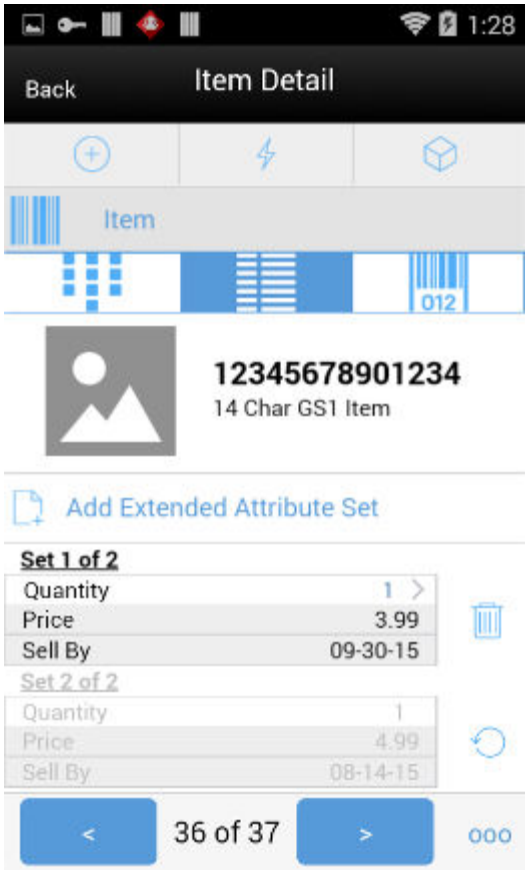
UINs can be added to the adjustment for UIN items via the scan enter item bar in the header. A UIN can be removed by tapping the trash can which will flag the UIN for removal and it will be deleted from the transaction upon saving or confirming the transaction. Lastly those UINs that have been flagged for removal can be added back to the transaction by selecting the **Restore** option.

> **Note**
>
> Some functional areas may have slight modifications to this screen to accommodate the functionality.

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Item Detail - Attributes

Figure 2-21 Item Detail - Attributes



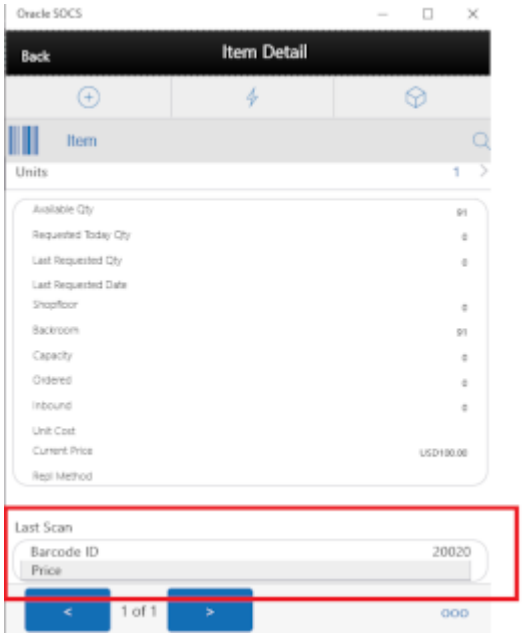
The Attributes screen is accessible from the Item Detail screen by selecting the **Attributes** icon. The store must be configured and the user must have Access <functional area> Attribute permission to Access the Attributes screen. In order to add and remove attributes the user must have Edit <functional area>Attribute permission. In addition, the item must be configured to be an item that has extended attributes. This screen will display attributes that may have been captured automatically from a GS1 barcode, or they may have been manually captured in this screen.

Sets of attributes can be captured manually by selecting the **Add Extended Attribute Set** button. The attributes to be captured depend on the attribute configuration for the item. A popup will be displayed to enter the attributes. Sets can be removed and then they will be flagged for deletion. Upon saving or confirming the transaction the flagged sets will be removed. The **Restore** feature will be available to bring back the attributes if necessary.

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Item Detail - Scan Details

Figure 2-22 Item Detail - Scan Details



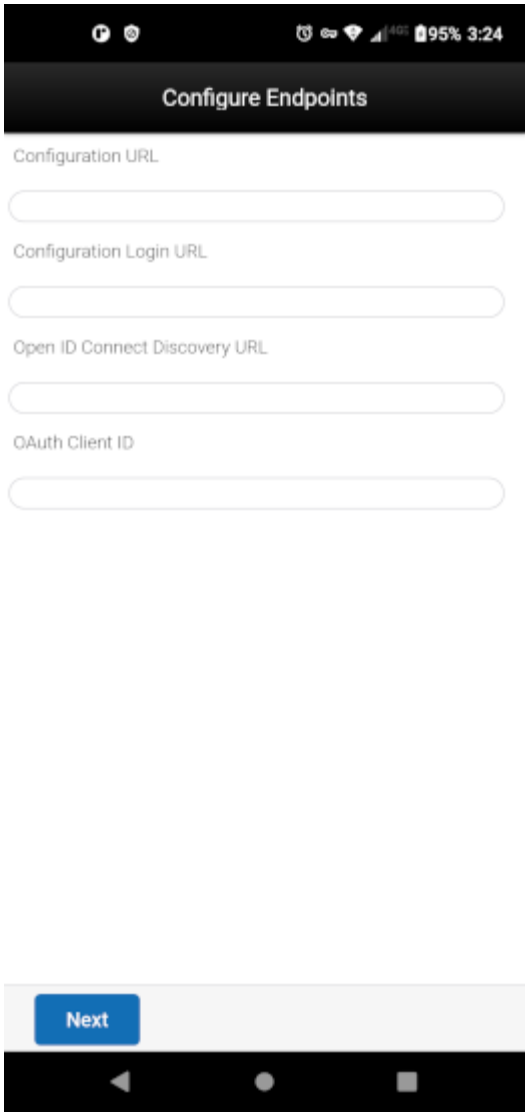
The last scan details are displayed on the bottom of all of the Item Detail screens in transactions of the mobile application. It includes the details from the barcode for the last item entered/scanned. This field is refreshed for each scan, so if an item has a quantity of 10, the Last Scan could have displayed different content for all ten barcodes/instances scanned.

- GS1 barcode - the system will display the barcode, GTIN, and the contents of the barcode (that is, price, UIN, and so on).
- Type 2, barcode, and Price.
- All other types of barcodes will display the actual barcode (UPC, UIN, and so on).

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Configure Endpoints

Figure 2-23 Configure Endpoints



This dialog on mobile device is for the user to configure the endpoints.

The **Configure Endpoints** screen is displayed by selecting the **Configure Endpoints** menu option within **Configurations** from the drawer/menu. The following fields are available on this screen and the technical details of the configuration can be found in the technical documentation.

Configuration URL

Configuration Login URL

Open ID Connect Discovery URL

OAuth Client ID

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Scanner Configuration

Figure 2-24 Scanner Config



- This screen on the mobile application is to configure the external scanners.
- The **Scanner Config** screen is displayed by selecting the **Scanner Config** menu option within **Configurations** from the drawer/menu.
- This screen will list all the paired/connected scanners to the device.
- Selecting the paired device will connect to the mobile device for the user in the application.
- If the device does not find any scanners paired/connected, it displays a message to indicate no scanners found.
- **Identify** - Upon selecting this button, the system makes the scanner you are connected to beep, so the user knows which one is used. Note: This button is displayed only in IOS.

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> **Note**
>
> For the scanner to find the external device, the location permission should be assigned to the client.

Figure 2-25 Scanner Detail



This screen is accessed on the mobile application by selecting the **Configure** option from the external **Scanner List** screen after an external scanner has been connected.

- **Scanner Name**: <Scanner Name> - the name of the connected scanners whose settings are displayed on the screen.
- **Battery Info Bar**: Visual progress bar showing the amount of battery remaining in the scanner:
  - The progress bar will be green if the battery remaining is greater than 30%.
  - The progress bar will be yellow if the battery remaining is between 15% and 30%.
  - The progress bar will be red if the battery remaining is less than 15%.
- **Battery %**: Shows the amount of battery life remaining as a numeric value (0-100%).
- **Battery State**: Will display either Charging or Discharging depending on if the battery is charging or discharging.

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- **Scan Power Slider Bar**: Displays the amount of power each scan takes on a slider bar. The slider bar can be dragged to a new value. The values are between 0 and 300 dBM.
- **Scan Power Input Field**: Displays the amount of power each scan takes as a numeric value. A user can enter a new numeric value in this field. Any value less than 0 will be set to 0, and any value greater than 300 is set to 300. This value updates if the slider bar value is changed.
- **Scan Volume**: Displays the current beep volume during a scan and presents values in a drop down to change. Values are: Quiet, Low, Medium, and High.

Buttons

- **Apply**: Will apply the settings to the connected external scanner.
- **Identify**: Upon selecting this button, the system makes the scanner you are connected to beep, so the user knows which one is used. Note: This button is displayed only in IOS.

Common Usability and Navigation JET Mobile

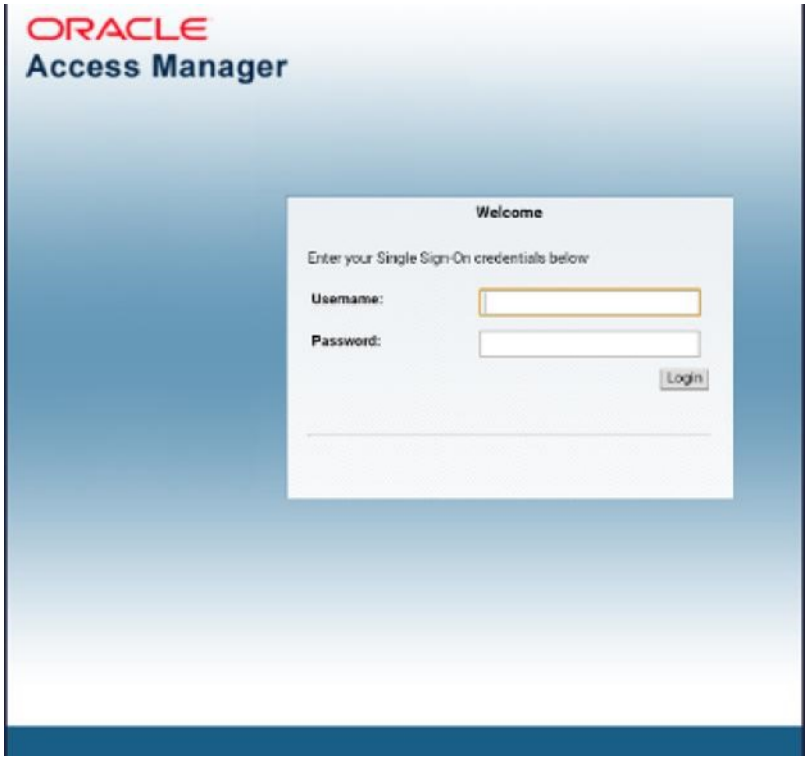
JET Mobile UI features:

- Welcome / Login
- Menu / Drawer
- Quick Actions
- Select Store
- Select Language
- Preferences
- Scan Type
- Scan Mode
- Unit of Measure
- Edit Quantity
- Filter Bar
- Scan Bar
- Search Criteria
- Item Image and Item Description
- Print
- Notes
- Item Detail Scan Details
- Item Detail UIN
- Item Detail Extended Attributes

Welcome / Login

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Figure 2-26 Welcome Screen

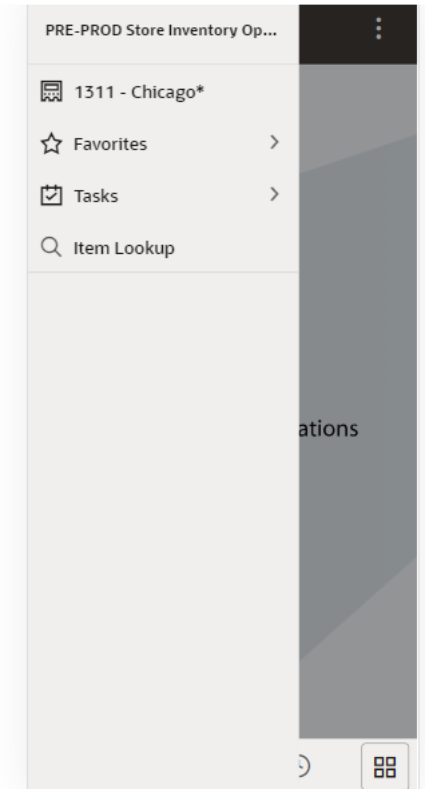


Upon launching the mobile UI application, the login screen is displayed. The first time a user logs into the system, if logon is successful, the system will log in to the user's first assigned store. The system will remember the store the user was last logged into and log in to that store until the store is changed. Upon successful login, the system will navigate you to the Open Transactions dialog.

Menu / Drawer

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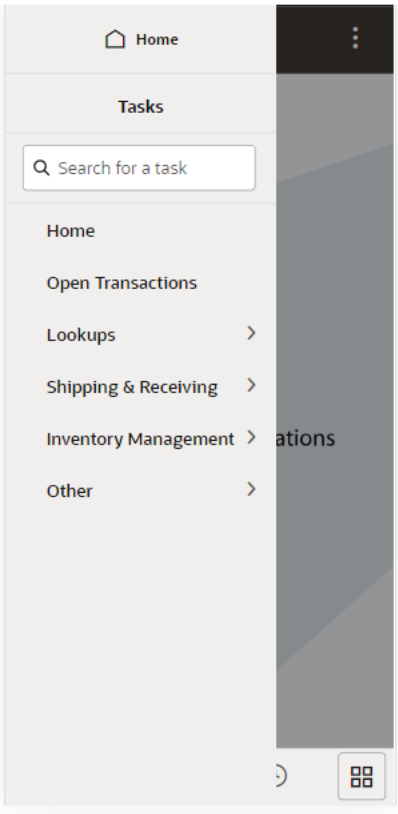
Figure 2-27 Menu/Drawer



The mobile drawer is displayed as the menu panel on the left side of the screen upon tapping the drawer (hamburger stack which looks like three horizontal lines in the upper left-hand corner of the application). The menu consists of the user's store to change stores, Favorites, Tasks, and Item Lookup.

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Figure 2-28 Tasks



From the menu/drawer the user can select Tasks to access various functionality of the application such as Lookups, Inventory Management, etc. The functional areas are displayed based upon the user's access permissions. Tasks can also be searched on.

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Figure 2-29 Favorites



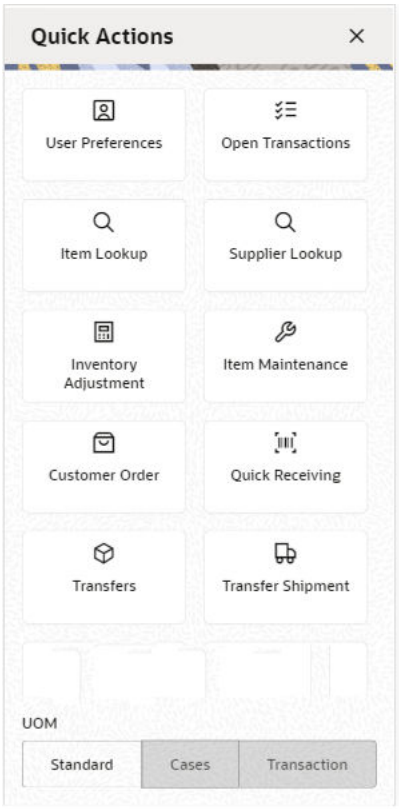
A favorite is a way of creating a shortcut for a task/menu that the user frequents often. A user's favorites are accessed by selecting the Favorites (star) option. The system will list all the favorites. Selecting a favorite will navigate into that dialog. The user can also search for a favorite and select the searched favorite and navigate into the dialog.

See the *EICS User Guide Common Usability and Navigation* chapter for details on Adding/ Removing Favorites, Pinning Favorites, and Editing Favorites

Quick Actions

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Figure 2-30 Quick Actions

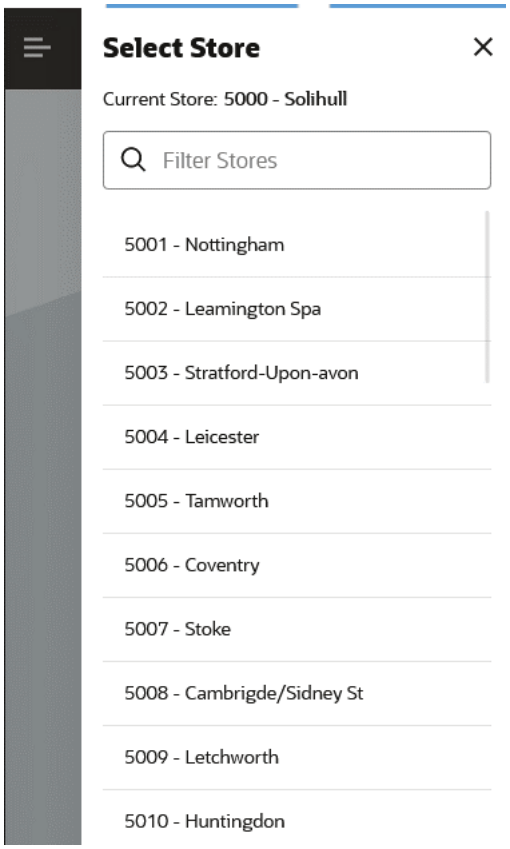


The Quick Actions menu is accessed by selecting the Quick Actions icon from the Application Panel Footer menu. Quick actions will include the same functionalities as the drawer menu such as Item Lookup, Quick Receiving, etc. User must have proper permission for the menu to display. Quick Actions will also be where User Preferences are accessed and an option for user to update UOM from here. The menu items on Quick Actions can be moved and rearranged by selecting the Edit Layout option and then dragging and dropping the menu item, thus allowing the user to put the more used / important menus at the top.

Select Store

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Figure 2-31 Select Store



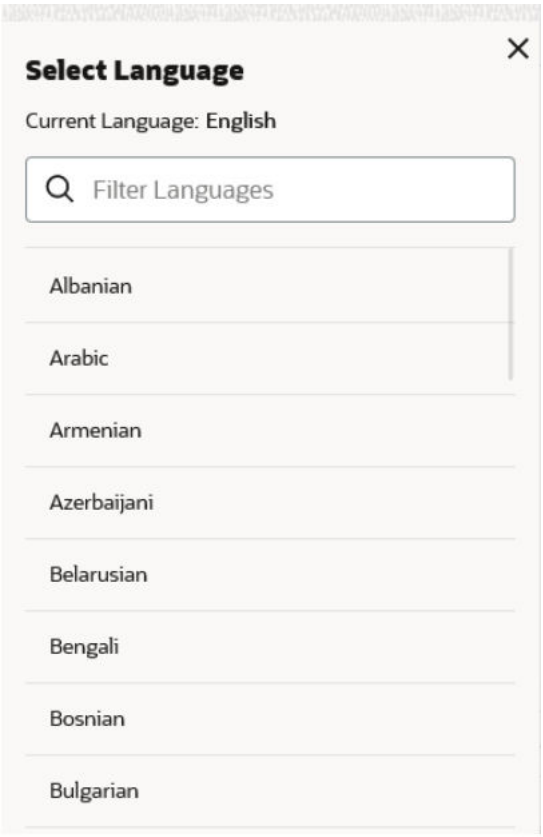
The select store function is available from the drawer/menu by tapping the Store. It is also in the Additional Options menu (…) in the upper right hand corner on the Open Transactions by tapping the User and then selecting Change Store the user is directed to the Select Store screen with an option to change stores.

The Select Store displays all the stores that the user is authorized for. If needed, the user can search for a store by either the store ID or store name. The store list is narrowed down based upon the search. Selecting a store will display the new store in the store field of the drawer/ menu. The user is then officially logged in to the new store. All data and transactions will be for the newly selected store. Every time the user logs in to the system, it will be for the store selected until a new store is selected. The system remembers/saves the store for the user.

Select Language

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Figure 2-32 Select Language

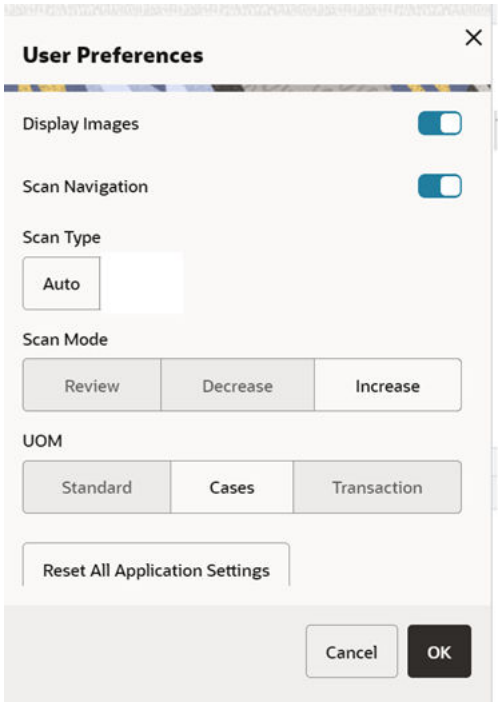


The **Select Language** screen is displayed by selecting the **Change Language** menu option within the Additional Options menu (…) in the upper right hand corner on the Open Transactions. Initially when a user is logging into the mobile for the first time ever, it will use the language of the device. The **Language** screen will display with a list of the available languages supported in the system. User selects a language, and the language will change in the application to the language selected and user will navigate to the **Open Transactions**. That language will remain for the user (saved on the user) until the user change languages. The locale of the device (date format, currency format, and so on) will remain that of the device

Preferences

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Figure 2-33 Preferences

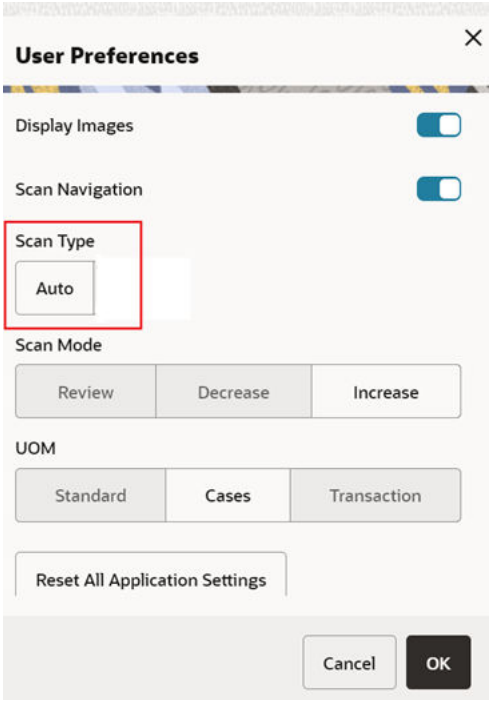


The Preferences dialog is accessed by selecting Preferences from the Quick Actions menu or by selecting Preferences from the Additional Options (…) menu in the upper right hand corner. Preferences are for the user on the JET Mobile application. Preferences include: displaying images, scan navigation preference, Scan Type, Scan Mode, and UOM. The Display Images preference will be available if the system setting, Display Images is set to ‘Yes’.

Scan Type

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Figure 2-34 Select Scan Type



The **Scan Type** is a found in preferences. It is used whenever an item can be entered or scanned within a Scan Bar. The scan type allows you to tell the system what type of item or barcode is being entered.

The only value for this is **Auto**.

Auto assumes that you can enter or scan any of the supported barcode types such as SKU, type 2, UPC E, GS1, UIN, and so on, and the system will parse through the various algorithms to derive the item.

Scan Mode

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Figure 2-35 Select Scan Mode

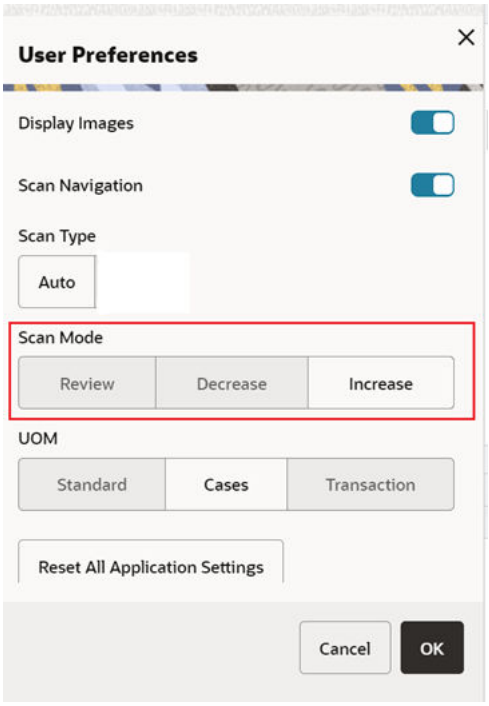


Figure 2-36 Select Scan Mode on Scan Bar



The **Scan** mode is a found in preferences. It is used whenever an item can be entered or scanned, and the quantity is captured. The scan mode in preferences will be used to default in the scan mode on the scan bar. The default scan mode in preferences when logging into the system initially will be ‘Increase’.

The scan mode will update the quantity as follows:

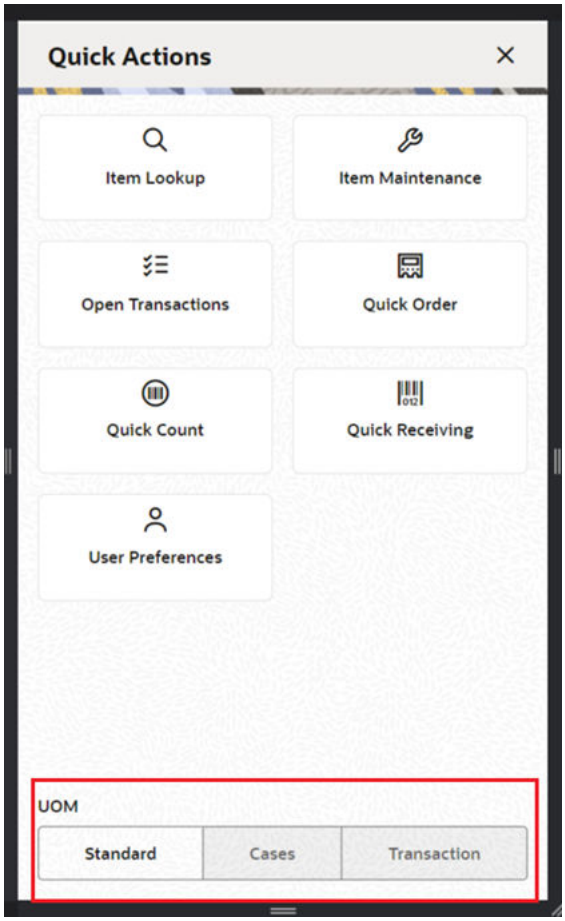
- Increase: Adds to the existing item quantity. The Scan Bar will show a ‘+’ sign
- Decrease: Removes from the exiting quantity. The Scan Bar will show a ‘-‘ sign
- Review: No change to the quantity. The Scan Bar will show an ‘Eye’ icon

The user can change the scan mode in the scan bar, and that will be the scan mode used upon entering / scanning an item, it trumps that of the preferences. The system will retain the scan bar defined scan mode until the user logs out of the session. Upon relogging in, the system will default the mode in the scan bar to the scan mode defined in the preferences.

Unit of Measure

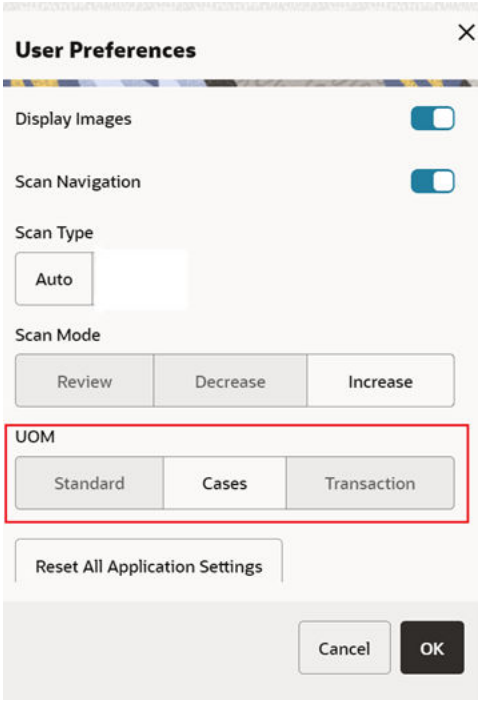
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Figure 2-37 Select Unit of Measure



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Figure 2-38 Unit of Measure



The **Unit of Measure** selection is a found on the Quick Actions menu as well as in Preferences. It is used whenever a quantity is captured. The unit of measure defines if the quantity displayed is going to be represented in the item's standard unit of measure, cases, or transaction unit of measure.

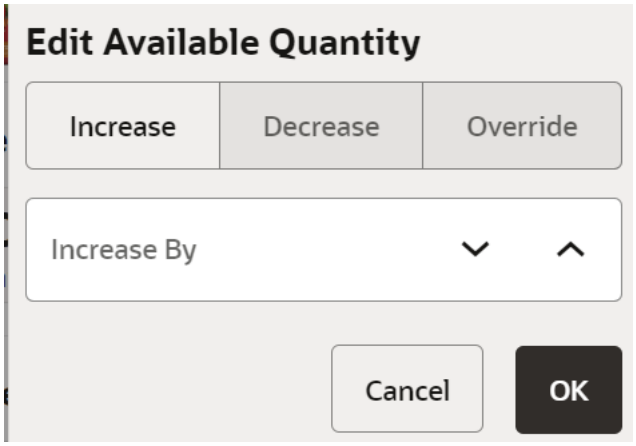
When switching the Unit of Measure, the quantity on the screen will convert to that unit of measure. When first logging in, the default unit of measure will be set based upon the system configuration **Default Unit of Measure**. The Unit of Measure selected by the user will remain as the UOM until the user changes it or Resets Application.

Transaction Unit of Measure will only be used where applicable which is in Customer Orders as well as Shipping and Receiving for a Customer Order. If Transaction UOM is selected in dialogs where it is not applicable, the system will use the Standard Unit of Measure even though the Transaction UOM may be selected.

Edit Quantity

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Figure 2-39 Edit Item Quantity



The **Edit Item Quantity** popup is used whenever there is an editable numeric field such as an item quantity field. The quantity that gets entered into the **Edit Item Quantity** popup will increase, Decrease, or override the existing quantity on the screen. The mode on the **Edit Item Quantity** will be defaulted per the system setting, **Manual Quantity Entry Default Mode**. When set to **Scan Mode**, the **Edit Item Quantity** popup defaults based upon what the Scan Mode is set to in Preferences. When set to **Override** the default will be **Override**. In all cases, these are only defaults, and the user can always change mode of the **Edit Item Quantity**.

Examples:

- Qty = 15, enter in 3 increase, Qty = 18

  There is a quantity of 15 on the UI. In the popup, the user enters a quantity of three, selects the increase option, and apply. The new quantity is 18.

- Qty = 15, enter in 3 reduce, Qty = 12

  There is a quantity of 15. In the popup, the user enters a quantity of three, selects the decrease option, and apply. The new quantity is 12.

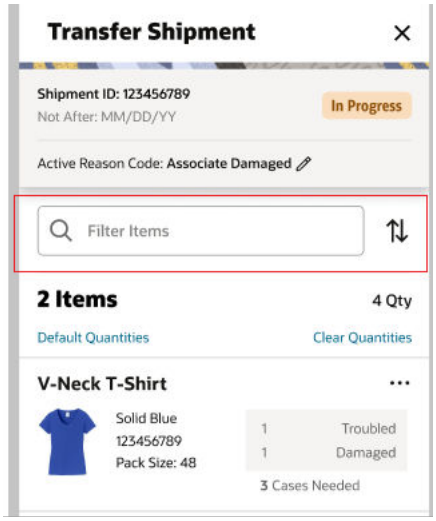
- Qty = 15, enter in 3 override, Qty = 3

  There is a quantity of 15. In the popup, the user enters a quantity of three, selects override, and apply. The new quantity is three.

Filter Bar

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Figure 2-40 Filter Bar

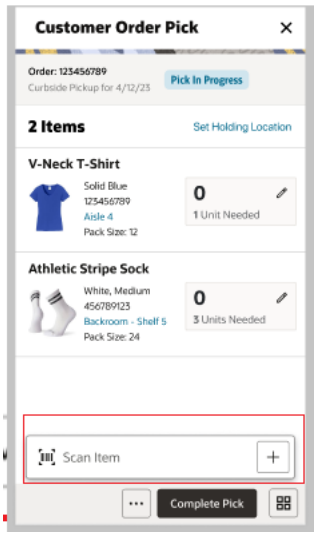


The **Filter** bar is used to narrow down a list of things such as items, containers, stores, and so on.

You can tap and type into the filter bar or tap and scan into a filter bar. By default, the **Filter** bar will be displayed on the top of the list. When scrolling down in the list, the filter bar disappears, and it reappears when scrolling back up in the list. The criteria that a user can filter on will be unique per functional area. The search is not case sensitive. The filter can be cleared out to return the full list. The filter will retain the entered criteria until leaving the screen in which it will be cleared out.

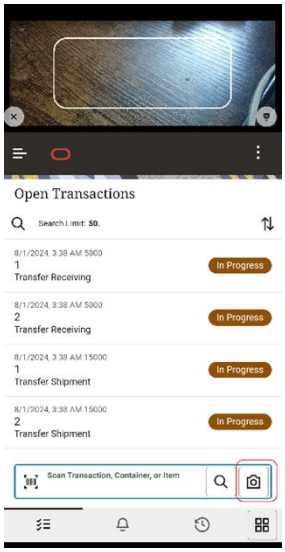
Scan Bar

Figure 2-41 Scan Bar



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Figure 2-42 Scan Bar Open Transaction



The scan bar is at the bottom of the transaction lists, Item Lists, other lists such as Child Count and Container Lists, and Item Detail screens. It will be anywhere an item, or some other attribute can be entered or scanned to be viewed or edited on a transaction.

This bar allows for one defined attribute to be scanned and that attribute will be stated in the text of the bar. For example: Item, Container or Customer Order ID.

In the Transaction List screens, the scan bar will further filter or funnel down the list of transactions when doing a scan. The scanned attribute will be added in addition to the existing search criteria. It will appear in the search criteria field.

When scanning /entering items from Item Lists, if the Scan Navigation user preference is set to 'Yes' (meaning navigate), the user will navigate to the item detail screen for that item. The quantity will be updated per the scanned/entered item barcode.

If the Scan Navigation user preference is set to 'No' (meaning do not navigate), the user will stay on the Item List and focus will be brought to the that item in the list. The quantities for the item will be updated on the list per the scan/entry of the barcode. This is only applicable in the case where a quantity is editable on the list screen. If the list does not have an editable quantity, then the system will always navigate to the Item Detail on scan.

If the system configuration **Enable Device Camera Barcode Scan** is set to **Yes**, then if a camera is detected on the device, the camera icon will be available. The camera icon will allow for scanning in the barcode via the camera on the device. The barcode will be parsed and processed the same as if the scanner was utilized.

The camera will auto scan the barcode every ‘x’ seconds, where ‘x’ is defined by the system admin setting, **Device Camera Auto Scan Timer**. Lastly, when the camera is open, it will auto close if the **Device Camera Auto Close** system setting is set to ‘Yes’. If it is set to ‘No’ the camera will stay open until closed by the user.

Search Criteria

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Figure 2-43 Search Criteria 1

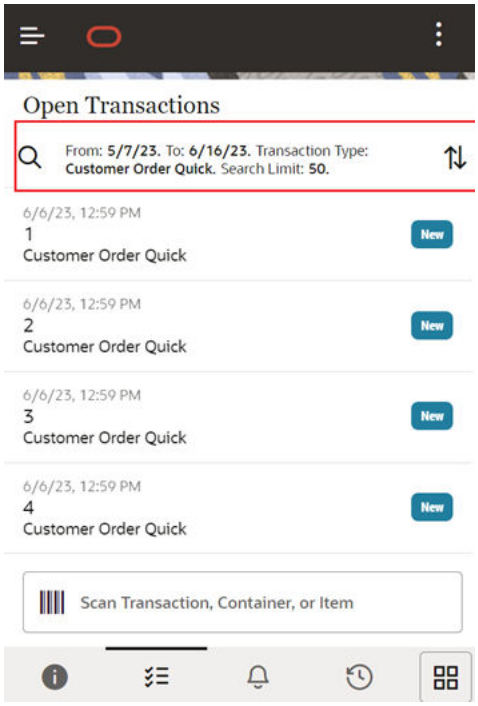
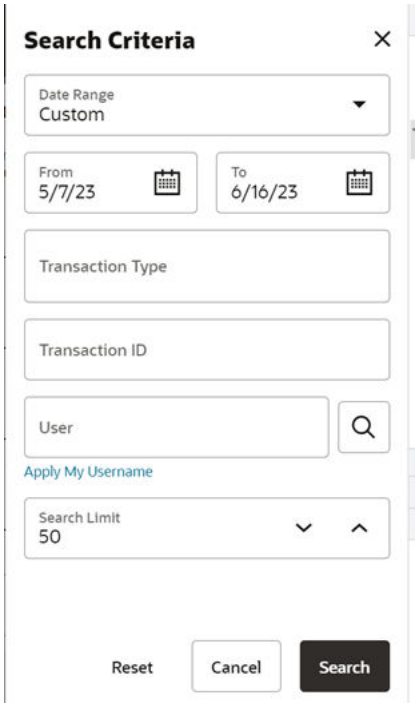


Figure 2-44 Search Criteria 2



The **Search Criteria** field is represented by a magnifying glass icon in the header of the screen. Search criteria will be found on transaction list screens, such as Notifications shown in this figure. Criteria will be listed. Initially when entering the dialog, the default search criteria for the functional area will be displayed.

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Tapping the **Search Criteria** field, will navigate to the **Search Criteria** screen to select and or change criteria to search with. The search criteria field gets updated with the newly selected search criteria fields from the **Search Criteria** screen. When leaving the dialog, the search criteria will be reset back to the default search criteria. Note: in Open Transactions the search criteria is retained until changed or reset.

Item Image and Item Description

Figure 2-45 Item Detail Item Image



The item image is displayed throughout the application wherever an item is displayed. The item image will be displayed with the Item ID and Item Description in all applicable screens. Item image is displayed based upon a user Preference, Display Images. If it is set to Yes, the image will be displayed in the application for the user. If it is set to No, the image will not be displayed.

The Item Description will display one or two lines depending on the system configuration, Display Item Description Diffs. If it is set to Yes, line one will display either the short or long description per the system configuration Display Item Description. The second line will display the diffs for the item if they exist otherwise it will be blank. If the Display Item Description Diffs. If it is set to No, only one line for the item description will be used and it will be the short or long description per the system configuration.

Print

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Figure 2-46 Print



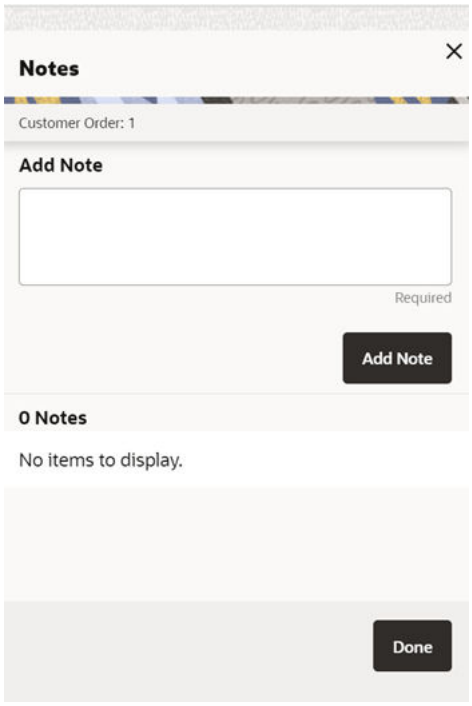
The **Print** dialog is accessed when selecting print within the application. It is available when selecting Print from the footer menu within a transaction.

The list of applicable reports will be given based upon what was setup on the desktop (Report Setup) for that functional area. The user must have data permissions assigned for the reports to be available. The user can choose to select a different report format to print if other report formats exist for this format type transaction. Once print has been selected for the report, the PDF is retrieved based upon the report format.

Notes

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Figure 2-47 Notes



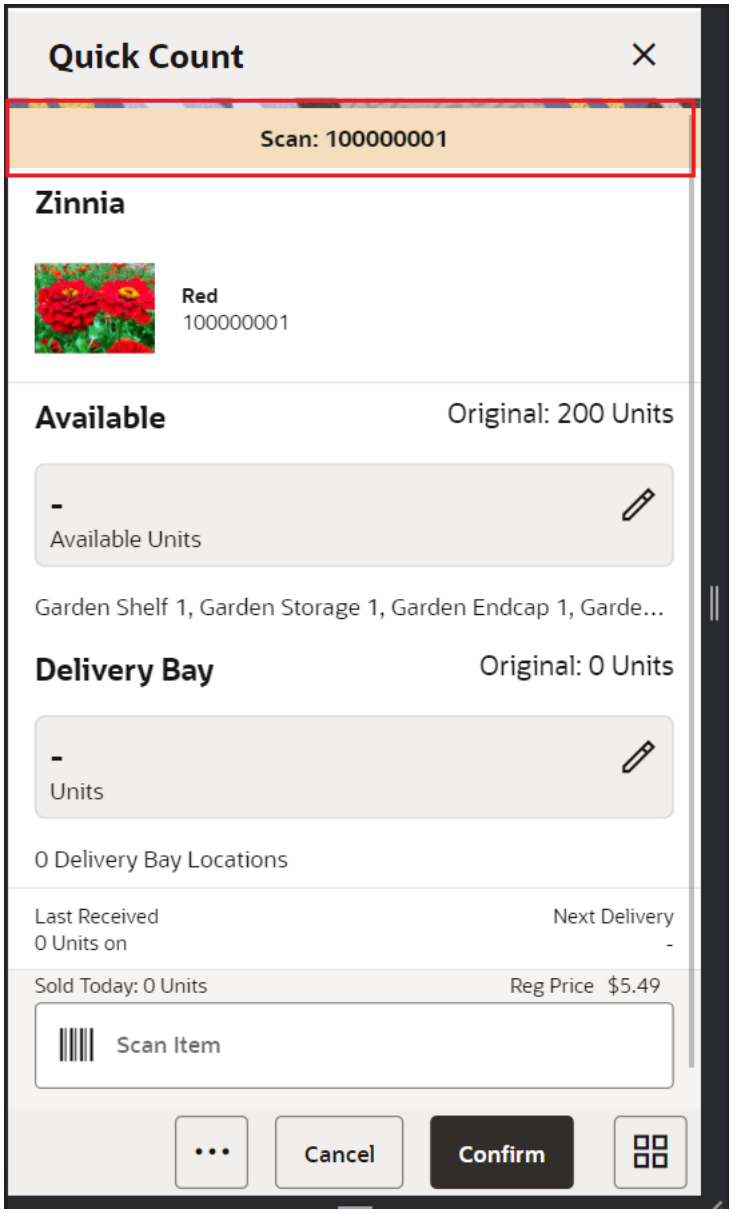
The **Notes** function is used to capture one or more notes about the transaction. It also allows you to view history or a trail of notes for a transaction. It is an optional process. The notes feature will be accessed from the footer menu within a transaction using the Notes menu option. Notes is available from within all transactions.

To add a note, enter the desired text and select the Add Note button. The note will be posted to the top of the list of notes in the Notes dialog. All notes will be listed in read-only mode with the user who created them and the creation date. Notes will always be available, and the user will always be able to add notes regardless of the transaction status. The user must have Create Notes permission to add notes.

Item Detail Scan Details

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Figure 2-48 Item Detail — Scan Details



The last scan details are displayed on the top of all of the Item Detail screens in transactions of the mobile application. It includes the details from the barcode for the last item entered/ scanned. This field is refreshed for each scan, so if an item has a quantity of 10, the scan details could have displayed different content for all ten barcodes/instances scanned.

- GS1 barcode - the system will display the barcode, GTIN, and the contents of the barcode (that is, price, UIN, and so on).
- Type 2, barcode, and Price.
- All other types of barcodes will display the actual barcode (UPC, UIN, and so on).

Item Detail - UIN

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Figure 2-49 Item Detail — UIN

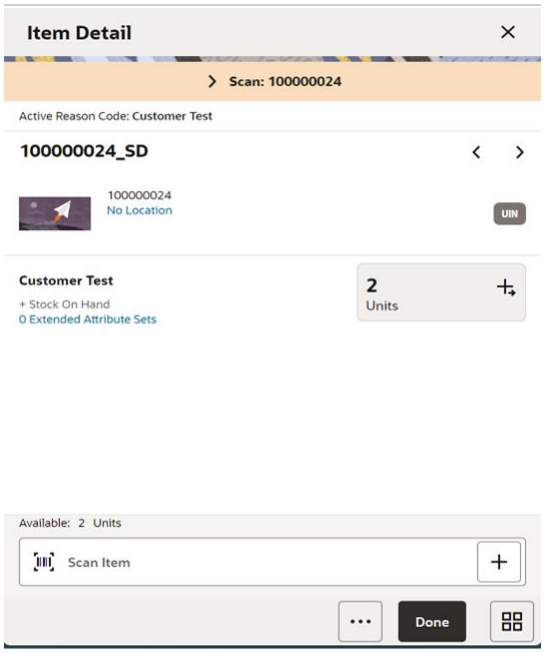
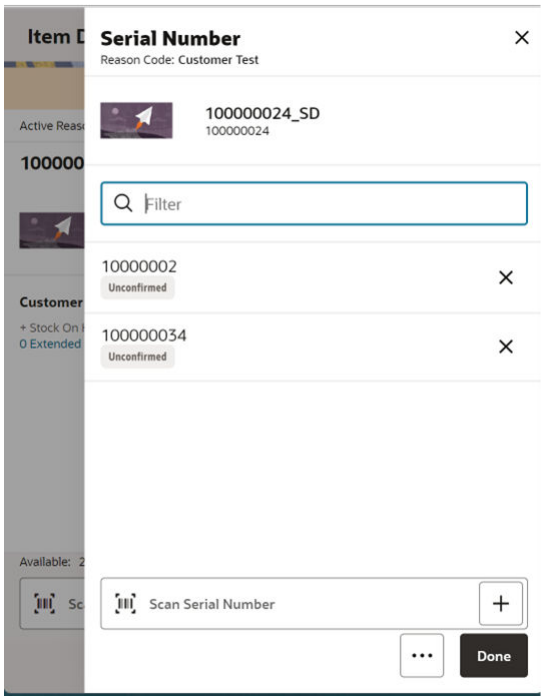


Figure 2-50 Item Detail — UIN — Serial Number



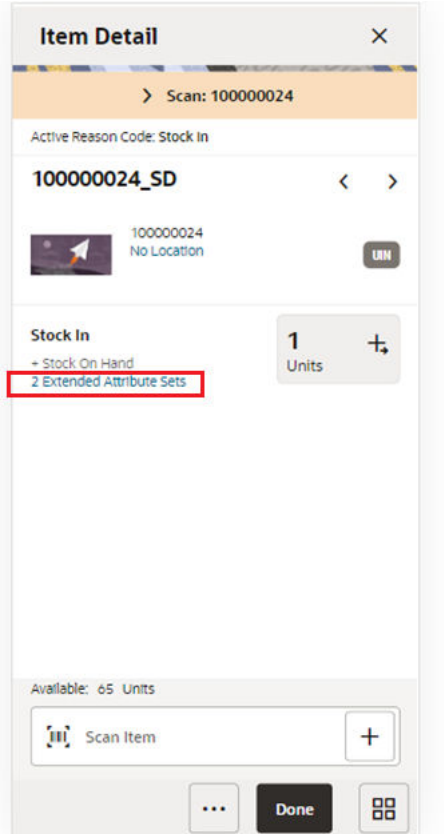
- If the store is configured to process UIN Items and if the item is an UIN item, the system will allow to capture the UINs/Serial Numbers for the transaction.
- The user can access the UIN/Serial Number popup by selecting the Quantity Field on the item detail screen within a transaction.

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- On the item detail screens for the UIN items, (AGSN and non AGSN), the quantity field is disabled and the selecting the edit quantity will take the user to the UIN/Serial Number popup screen.
- The Edit Quantity icon will be a <pen>+, + to show that UINs are needed.
- Quantity gets updated per UINs being added / removed on the UIN panel .
- The system does not look for the Edit Quantity permission for the UIN items to see if a quantity is editable or not. With UINs, the quantity field is always disabled with a few exceptions like receiving.
- On the Serial Number screen, the user can add or delete the serial numbers and it will be updated upon confirming the transaction.
- The user can select the Remove All option from the footer menu to remove all the Serial Numbers/UINs.

Item Detail - Extended Attributes

Figure 2-51 Item Detail



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Figure 2-52 Extended Attributes

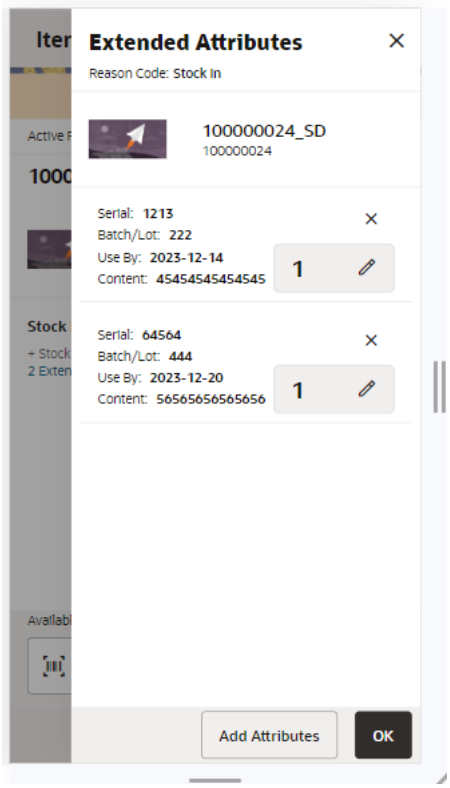
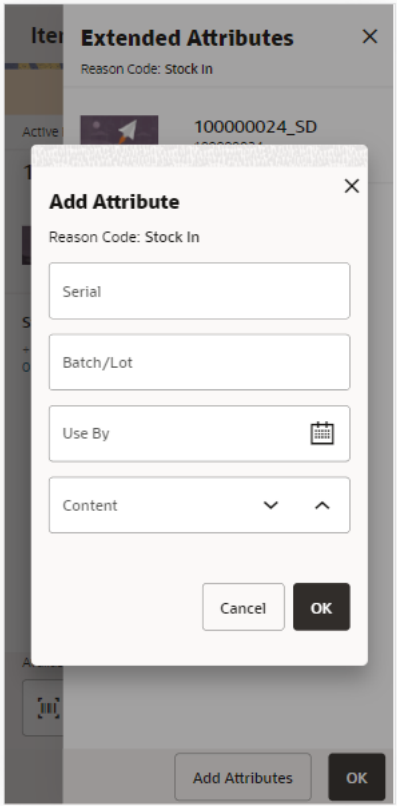


Figure 2-53 Add Attribute



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Extended Attributes are added at the item level on transactions. They can be accessed on the transaction item list screen by selecting the line level overflow menu and then the Extended Attributes option. The Extended Attributes screen is also accessible from the Item Detail screen by selecting the < x> Extended Attribute Sets link.

The Use Extended Attributes config must be set to ‘Yes’ to use extended attributes for the store and the user must have permission for that functional area, Access functional area Attribute. In order to add and remove attributes, a user must have Edit <functional area> Attribute permission.

This screen will display attributes that may have been captured automatically from a GS1 barcode, or they may have been manually captured in this screen. Sets of attributes can be captured manually by selecting the Add Attributes button. The attributes to be captured depend on the attribute configuration for the item (setup on desktop). A popup will be displayed to enter the attributes. Sets can be removed by selecting the ‘x’ icon for the set. The quantity field will increment each time the GS1 Databar is scanned.

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3

Open Transactions, Notifications and Recently Edited

This chapter is divided into the following sections:

- Open Transactions and Notifications MAF Mobile
- Open Transactions JET Mobile
- Notifications JET Mobile
- Ad Hoc Notifications
- System Notifications
- Recently Edited JET Mobile
- External Scanners JET Mobile

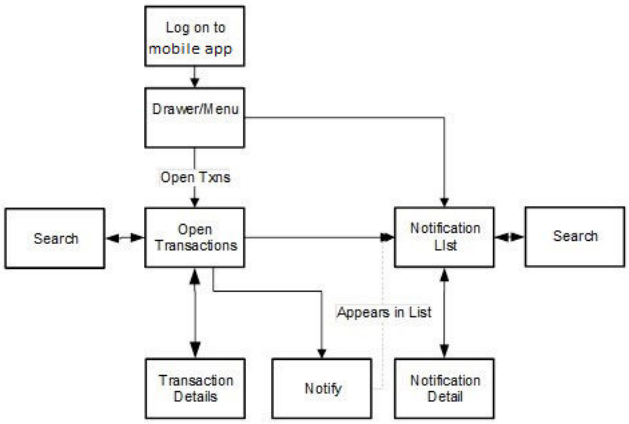
Open Transactions and Notifications MAF Mobile

The Open Transactions dialog lists all the open transactions for your store. Transactions include: Transfer, Transfer Shipment, Transfer Receiving, RTV, RTV Shipment, DSD Receiving, Inventory Adjustment, Item Basket, Stock Count, Shelf Replenishment List, Customer Order, Customer Order Pick, Customer Order Delivery, Customer Order Reverse Pick, and Store Orders.

Features:

- View list of open transactions
- Search for open transactions Show details of transactions
- Send notifications
- Access and view notifications

Figure 3-1 Open Transactions Screen Flow



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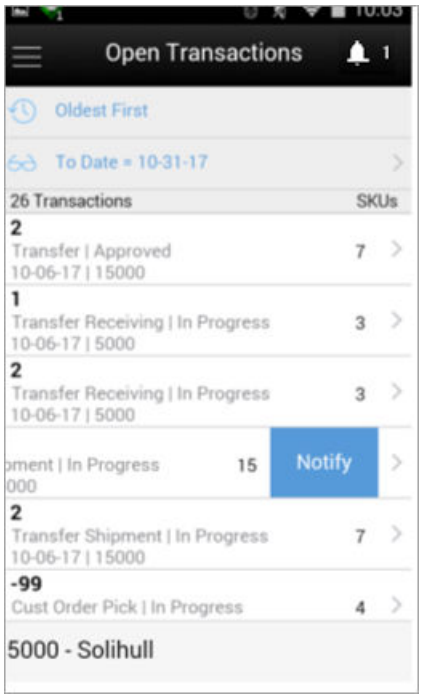
This is the screen flow for Open Transactions and Notifications. Initially upon logging on, the Open Transactions screen is displayed which is also accessible via the **Drawer** menu.

The Open Transactions screen lists all of the Open status transactions within the system. From here, you can filter the open transactions, view transaction details, and send out notifications for the open transactions.

The Notification dialog is accessed from the Drawer menu as well as from Open Transactions. It lists all of the notifications and allows for further filtering of the notifications or viewing of the details of the notifications.

Open Transactions

Figure 3-2 Open Transactions



The Open Transactions screen is accessed upon logon as well as by selecting **Open Transactions** from the menu drawer. The Open Transactions screen lists all the open transactions for the store you have permission to access. Selecting one of these transactions navigates you to the details for that transaction. The transaction can be viewed, edited, deleted, and so on, just as it would be had you navigated directly into that specific functional area. Once leaving the transaction you navigate back to Open Transactions.

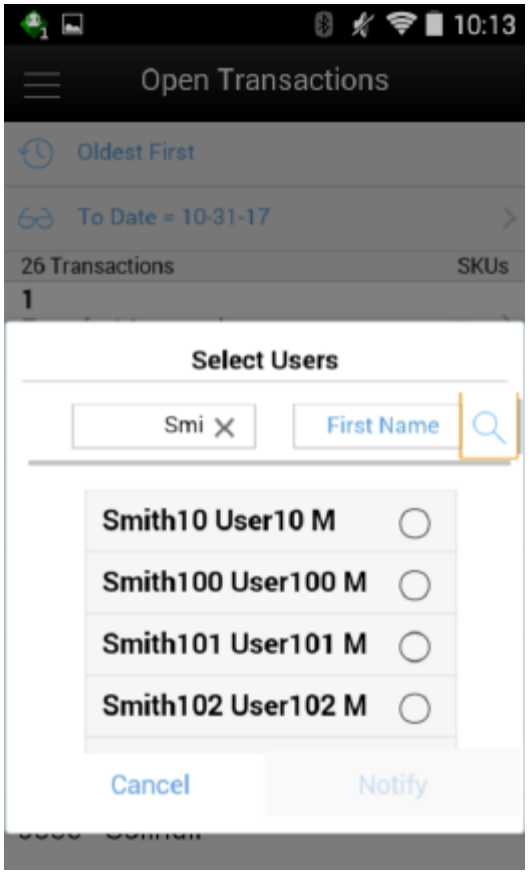
Each transaction has a transaction ID and transaction type such as inventory adjustment, stock counts, and so on, for identification. The status, last update date, user, SKUs and not after date for the transactions will be displayed.

Open transactions are sorted based upon the **Sort** button. The sort defaults to oldest first and tapping on Sort allows you to change the sort to newest first.

The search eye glasses icon opens up a search criteria screen that can be used to further narrow down the list of open transactions. All applied search criteria will be displayed in this field. The Open Transactions list screen does not have any default search criteria initially when entering the screen.

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Figure 3-3 Select Users Popup



The Select Users popup is displayed by swiping a transaction on Open Transactions and selecting the **Notify** button. The select users popup is initially an empty list and you must enter in either a full or partial (at least two characters) first or last name to search on. The system will return a list of valid user names (Last Name, First Name, and Middle Initial) for the store you are logged in to.

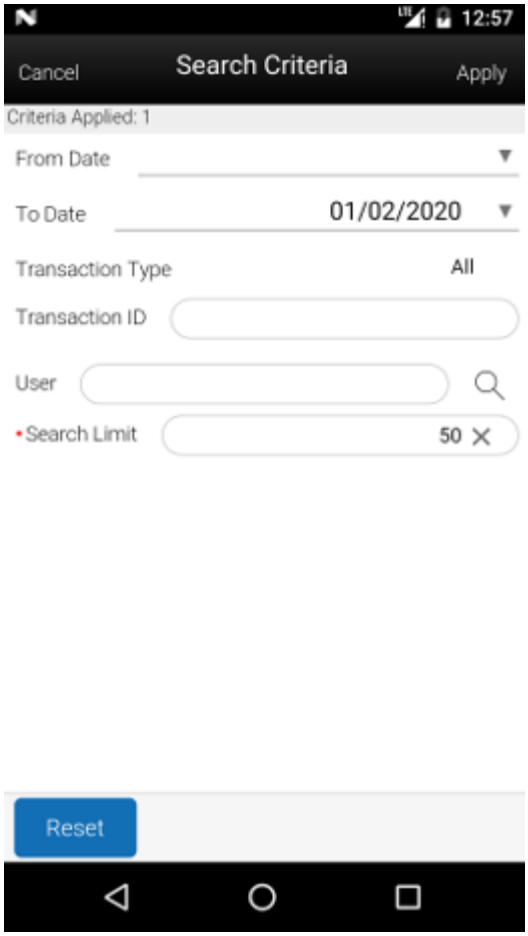
> **Note**
>
> This popup is used to find user names and not roles.

Select a name from the list of results and the system will create an ad hoc notification for the open transaction to that user. The manually created ad hoc notification appears in the notification list screen of the selected user that was notified, upon logging in to that store. Open transactions can have more than one notification sent.

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Search Criteria (Open Transaction)

Figure 3-4 Search Criteria (Open Transaction)



From the Open Transactions screen, selecting the search criteria button, which looks like a pair of eye glasses, takes you to the Search Criteria screen. This screen is used to narrow down the open transactions further and search for open transactions with specific criteria.

The header shows the number of criteria that have been applied. The Home Page of open transactions displays all open transactions for the user's store by default and there will be no initial criteria applied. Open status is represented by an array of statuses and they can be different depending on the transaction. Open status will represent any status which is not completed, canceled or closed, in other words actions can still be taken.

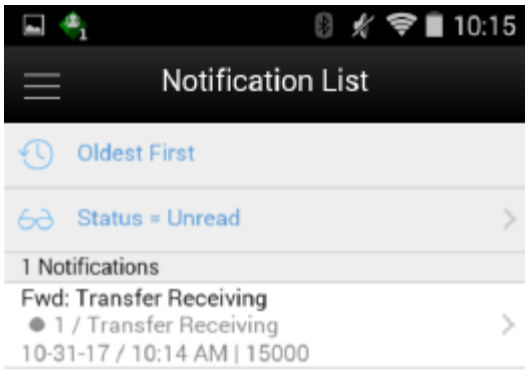
Criteria include From and To Date which look at the last updated date on the transaction if one exists, otherwise the create date. The transaction type is the type of the transaction such as inventory adjustment, stock count, DSD receiving, and so on. The transaction ID will be the actual ID associated with the transaction, thus multiple transaction types may have the same transaction ID. The user allows for searching on the User ID, this may be the last updated user ID or the create user ID depending on the transaction. The search limit field is defaulted per the system admin setting and is used to determine the maximum number of records returned in the search.

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Once search criteria have been selected and applied, you will navigate back to the Open Transactions screen with the list narrowed down per the entered criteria. The **Reset** button will clear out all entered search criteria and reset it back to the default criteria. Search criteria will be retained until being either reset or leaving the Open Transactions dialog.

Notification List

Figure 3-5 Notification List



The Notification List screen is accessed by tapping the notification (bell) icon, in the Drawer Menu. The Notification List defaults to display all unread notifications for the user at the user's store. The notification may be system generated or manually created (ad hoc).

By default, the screen will display the notifications with the unread notifications first. The sort can be changed to newest first or oldest first. Notifications can be in a read or unread state with unread being denoted with a dot in front. The notification names, transaction ID, transaction type, create date, and user will be displayed for the notifications in the list. The notification name is displayed in user's preferred language.

Swiping a read notification will display a **Mark As Unread** button. Selecting **Mark As Unread** will set the status of the notification from read back to unread. The **Mark As Unread** button will only be available for notifications that have been flagged. Selecting a notification will navigate the user to the details for that notification.

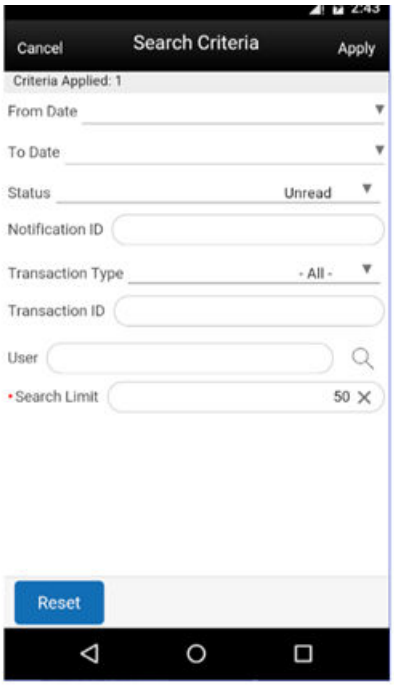
The search eye glass icon will open up a search criteria screen for the notifications which can be used to further narrow down the list of notifications. All applied search criteria will be

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displayed in this field. The default search criteria for the notifications will be for the unread status of notifications.

Search Criteria (Notification)

Figure 3-6 Search Criteria (Notification)



Selecting the search criteria button (eye glasses) from the Notification List screen, will take you to the Notification Search Criteria screen. This screen is used to search for notifications for the user's store with specific criteria. The header will show the number of criteria that have been applied. The Notifications search criteria will default to the status of unread.

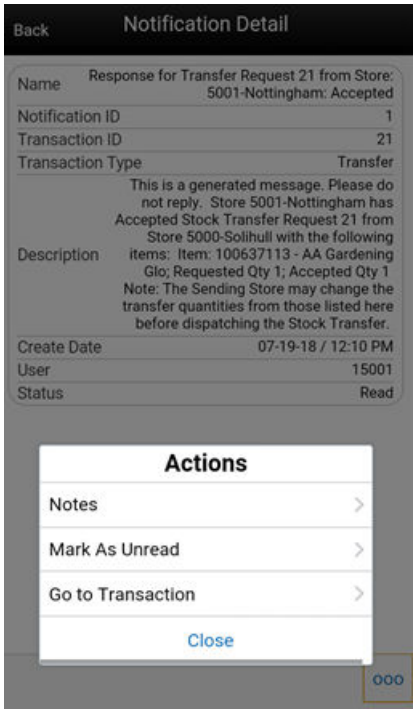
Criteria include Create From and Create To Date, status, notification ID and type, transaction ID and type, user, and search limit. The search limit is defaulted per the system admin setting and is used to determine the maximum number of records returned in the search.

Once search criteria have been selected and applied, you will navigate back to the Notification List screen with the notifications narrowed down per the entered criteria. The search criteria will be retained until they are reset or when leaving the notifications dialog.

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Notification Detail

Figure 3-7 Notification Detail



The Notification detail screen is accessed when selecting a notification from the Notification List screen. This screen displays the details of the notification.

The notification ID is a system-generated ID. The notification name is either 'Forward' with the transaction type for ad hoc notifications, or the subject line of the system-generated notifications. The transaction ID and transaction type are from the transaction of the notification. The create date is the date the notification was generated. The user is the user who created the notification; for system-generated notifications, the user is the user who triggered the notification such as the system or batch user. The status will either be read or unread. The notification name and description are displayed in user's preferred language.

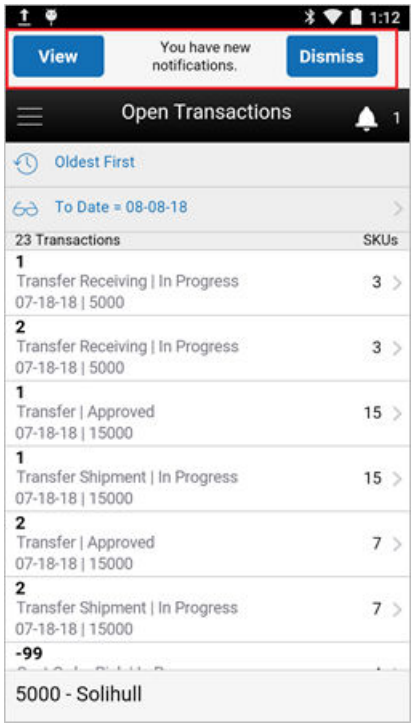
When entering the notification, the status of the notification will automatically be marked to Read and the **Mark As Unread** option will be available within the footer menu. Selecting **Mark as Unread** will set the status back to Unread. Once the notification is in Unread status, the footer menu option will change to **Mark As Read**. The user can set the status back to Read by selecting this option.

Also within the footer will be a Notes option which navigates to the standard notes dialog for entering in notes about the notification. Lastly, in the footer is a **Go to Transaction** option which allows the user to jump into the transaction associated with the notification for the user's store. This option is only available to users that have access permission for the functional area. Once in the truncation transaction the user will be able to view, edit, delete, and so on, the transaction as they would had they entered it directly assuming the user has proper permissions. Once leaving the transaction the user will return back to the Notification Detail screen.

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Notification Warning Display

Figure 3-8 Notification Display



A notification warning bar is displayed at the top of the application on every screen within the mobile application whenever a new notification comes into the system and is saved. The system checks every 'x' seconds for a new notification, where 'x' is a system configured amount of time. If a new notification exists for the user logged into the system, and if the user has the permission to display the notification warning, then the notification will be displayed. The user can access the details for the notification from the notification warning. The notification warning bar will be displayed until the user views or dismisses the notification or the user logs into a new session.

Open Transactions JET Mobile

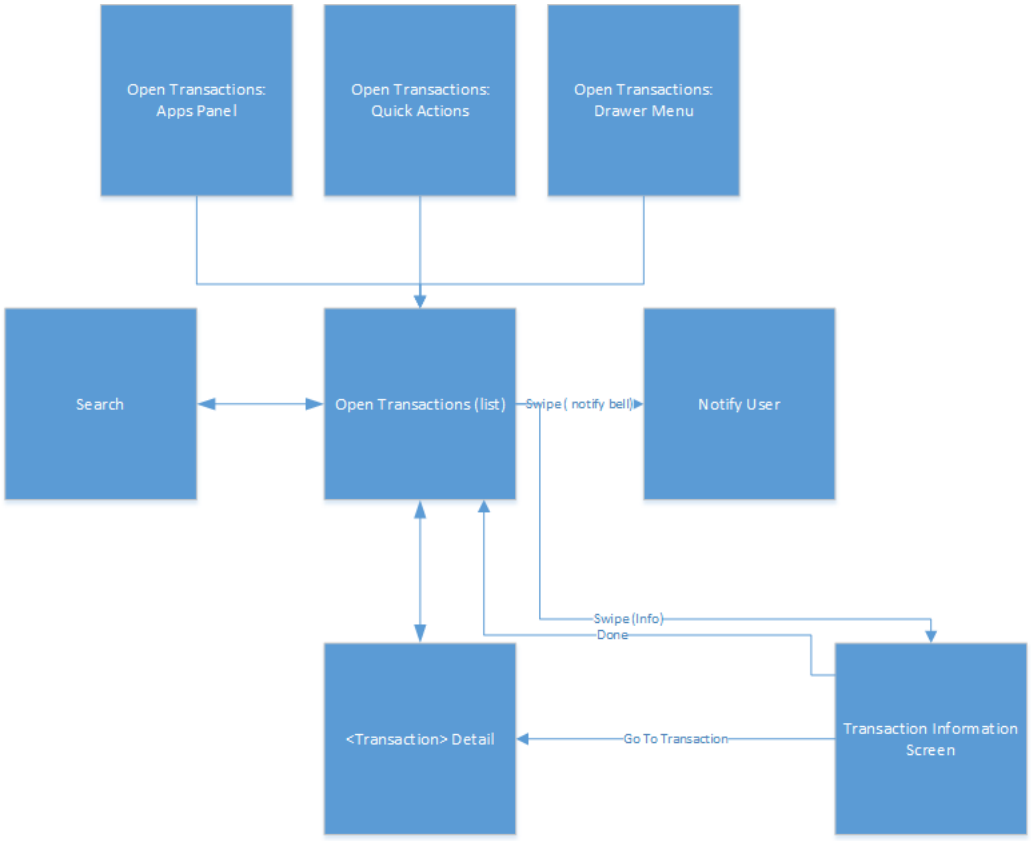
The Open Transactions dialog lists all the open transactions for your store. Transactions include: Customer Order, Transfer Receiving, and Stock Count.

Features:

- View list of open transactions
- Search for open transactions
- Navigate into transaction to view/edit

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Figure 3-9 Open Transactions Screen Flow



This is the screen flow for Open Transactions. Initially upon logging on, the Open Transactions screen is displayed which is also accessible via the **Drawer** menu, the application panel (footer), and quick actions.

The Open Transactions screen lists all of the Open status transactions within the system for the user. From here, you can filter the open transactions and select a transaction to view transaction details. The user can also be notified of an open transaction. See: Notify User section.

Open Transactions

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Figure 3-10 Open Transactions

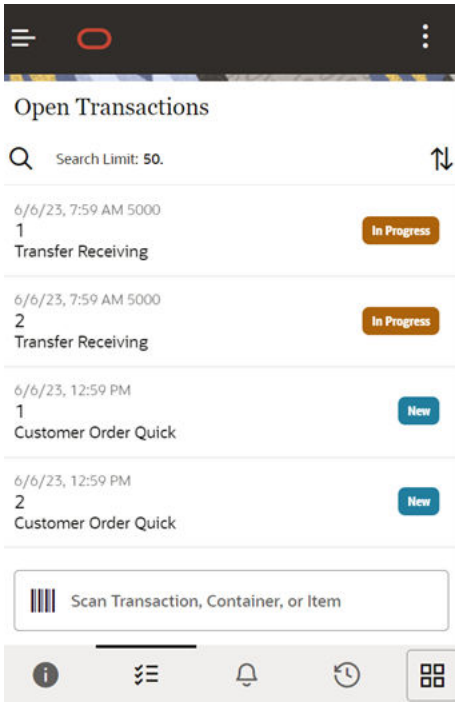
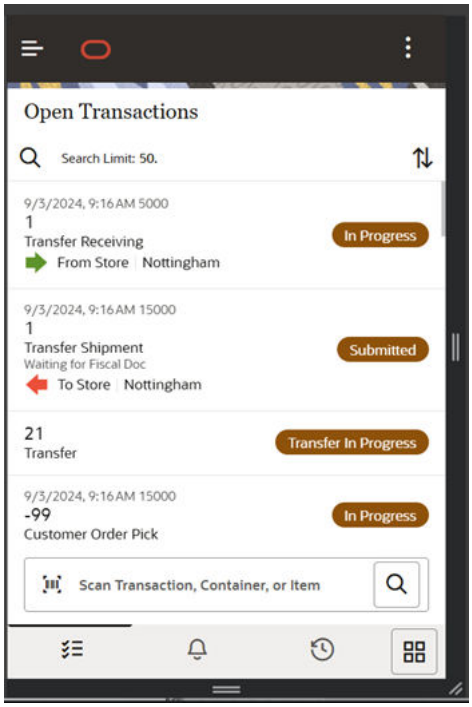


Figure 3-11 Open Transactions



The Open Transactions screen is accessed upon logon as well as by selecting Open Transactions from the menu drawer, the application panel footer menu or quick actions. The Open Transactions screen lists all the open transactions for the user's store you have permission to access. Selecting one of these transactions navigates you to the details for that

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transaction. The transaction can be viewed, edited, deleted, and so on, just as it would be had you navigated directly into that specific functional area. Once leaving the transaction you navigate back to Open Transactions.

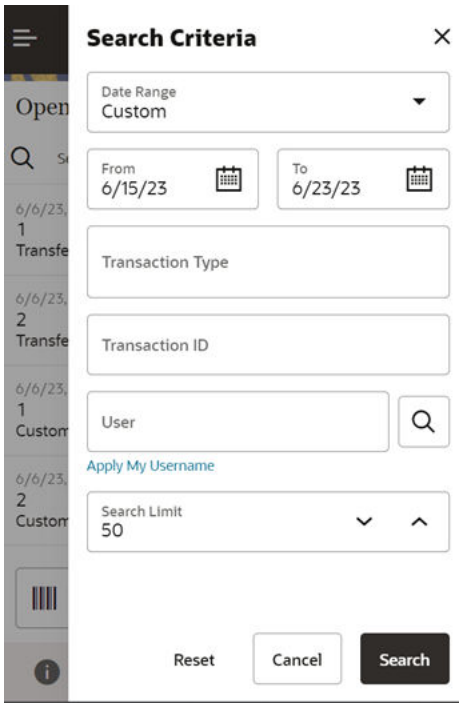
Each transaction has a transaction ID and transaction type such as customer order, stock counts, and so on, for identification. The status, last update date, and user are displayed for the transaction. For Transfer Shipment and RTV Shipment, if the shipment is in ‘submitted’ status and the system is configured for E-way bills, the E-way bill request status will also be displayed. Statuses include: ‘Waiting for Fiscal Doc’, ‘Fiscal Doc Approved’, and ‘Fiscal Doc Rejected’.

The records are sorted based upon the Sort button. The sort defaults to oldest first and tapping on Sort allows you to change the sort to newest first.

The search icon opens up a search criteria screen that can be used to further narrow down the list of open transactions. All applied search criteria will be displayed in this field. The Open Transactions screen does not have any default search criteria initially when entering the screen. Swiping an open transaction will allow the user to notify another user in regards to the open transaction. See Notify User section. Lastly, swiping has an additional option of selecting Info which will navigate to the Information screen for that transaction.

Search Criteria (Open Transaction)

Figure 3-12 Search Criteria (Open Transaction)



From the Open Transactions screen, selecting the search criteria icon, takes you to the Search Criteria screen..The search criteria screen allows the user to search on additional fields to narrow down and find an open transaction. There is no default set for search criteria.

Criteria include a date range (for example, Last 3 days) and From and To Date, which loosk at the last updated date on the transaction if one exists, otherwise the create date. The transaction type is the type of the transaction such as stock count, customer order, and so on.

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The transaction ID will be the actual ID associated with the transaction, thus multiple transaction types may have the same transaction ID. The user allows for searching on the User ID, this may be the last updated user ID or the create user ID depending on the transaction. The search limit field is defaulted per the system admin setting and is used to determine the maximum number of records returned in the search.

Open status is represented by a group of statuses, and they can be different depending on the transaction. Open status will represent any status which is not completed, canceled or closed. In other words actions can still be taken.

Once search criteria have been selected and applied, you will navigate back to the Open Transactions screen with the list narrowed down per the entered criteria. The Reset button will clear out all entered search criteria and reset it back to the default criteria. Search criteria in Open Transactions will be retained forever until reset or or changed by the user. This is different than other areas where criteria is reset upon leaving the area.

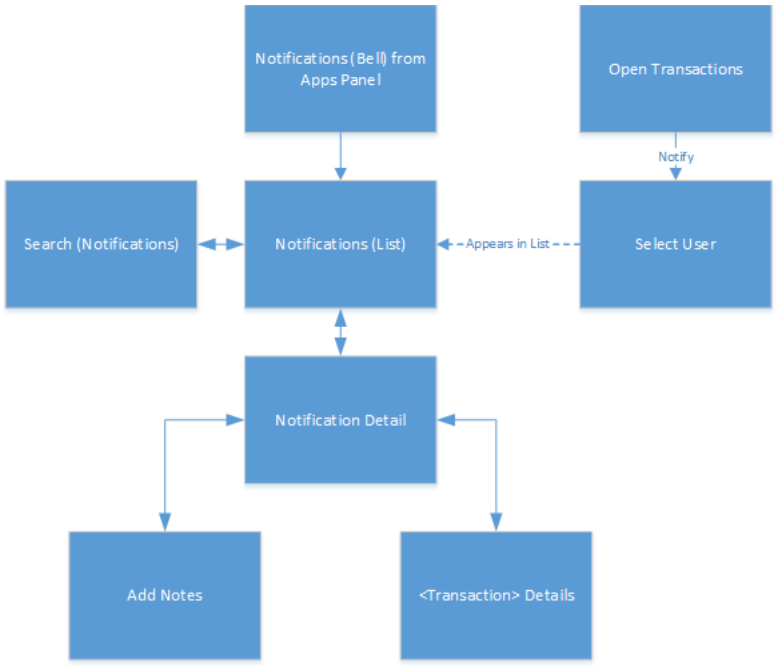
Notifications JET Mobile

The Notifications dialog lists all the notifications for the user at the user's store.

Features:

- Access and view notifications
- Navigate to transaction affiliated with notification
- Notify User of Open Transaction

Figure 3-13 Notifications Screen Flow



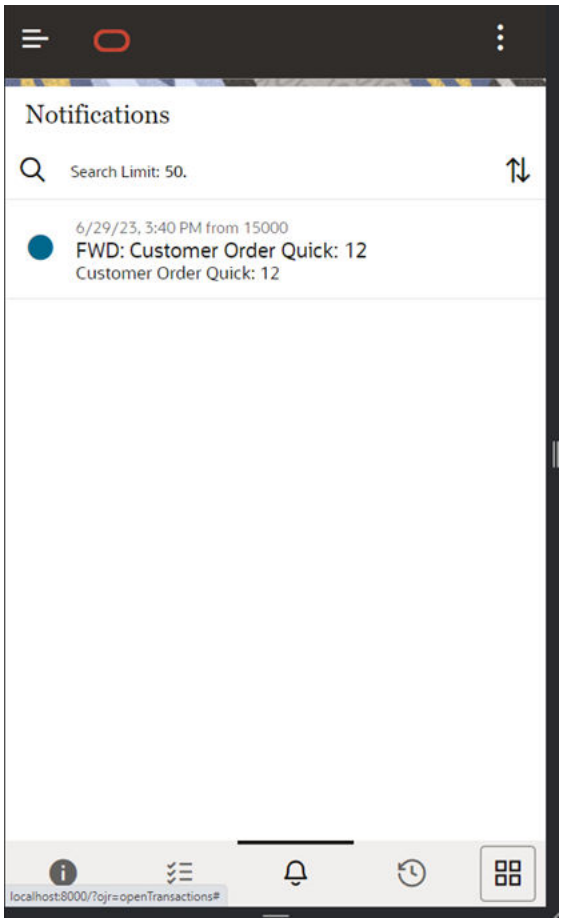
This is the screen flow for Notifications. Notifications can be accessed by selecting the **Bell** icon in the application panel footer menu. Notifications can be viewed (read), notes can be associated to a notification and a user can navigate into the details of the transaction

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associated with the notification. Lastly, an ad hoc notification can be sent from an open transaction.

Notifications

Figure 3-14 Notifications



The Notifications screen is accessed by tapping the notification (bell) icon, in the Application Panel footer menu. The Notifications list defaults to display all unread notifications for the user at the user's store. The notification may be system generated or manually created (ad hoc).

By default, the screen will display the notifications with the unread notifications first. The sort can be changed to newest first or oldest first, or to story by transaction ID or type. Notifications can be in a read or unread state with unread being denoted with a dot in front. The notification names, transaction ID, transaction type, create date, and user will be displayed for the notifications in the list. The notification name is displayed in user's preferred language.

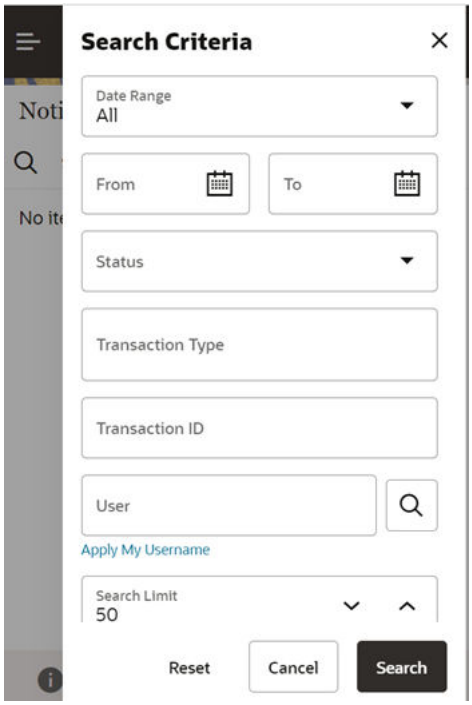
Swiping a notification gives a list of options to the user: Notes, Mark as Unread, Mark as Read, and Go to Transaction, Notes can be added using the standard noted dialog. If a transaction has not been read, the Mark as Read option will set the notification to ‘Read’. If a notification has been ‘read’, then the Mark As Unread will set the status of the notification from read back to unread. Lastly, Go to Transaction will jump the user into the details of the transaction affiliated with that notification.

Selecting a notification will navigate the user to the details for that notification.

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Search Criteria (Notification)

Figure 3-15 Search Criteria (Notification)



Selecting the search criteria button (eye glasses) from the Notifications screen, will take you to the Notification Search Criteria screen. This screen is used to search for notifications for the user's store with specific criteria. The header will show the number of criteria that have been applied. The Notifications search criteria will default to the status of unread.

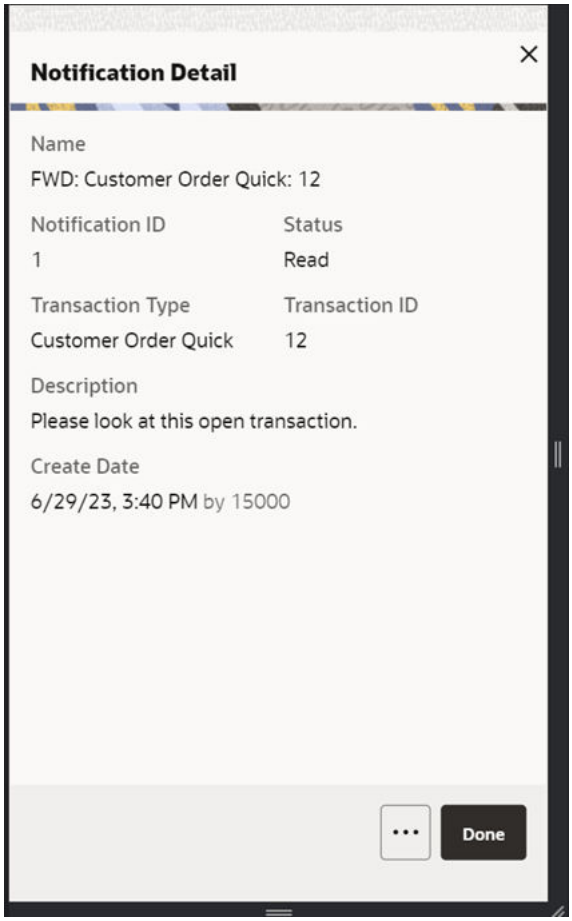
Criteria include Date Range, Create From and Create To Date, status, transaction type, notification ID, transaction ID, user, and search limit. The search limit is defaulted per the system admin setting and is used to determine the maximum number of records returned in the search.

Once search criteria have been selected and applied, you will navigate back to the Notifications screen with the notifications narrowed down per the entered criteria. The search criteria will be retained until they are reset or when leaving the notifications dialog.

Notification Detail

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Figure 3-16 Notification Detail



The Notification Detail screen is accessed by selecting a notification from the list on Notifications. This screen is a read only screen that shows the contents of the notification.

The notification ID is a system-generated ID. The notification name is either 'Forward' with the transaction type for ad hoc notifications, or the subject line of the system-generated notifications. The transaction ID and transaction type are from the transaction of the notification. The create date is the date the notification was generated. The user is the user who created the notification; for system-generated notifications, the user is the user who triggered the notification such as the system or batch user. The status will either be read or unread. The notification name and description are displayed in user's preferred language.

When entering the notification, the status of the notification will automatically be marked to Read and the **Mark As Unread** option will be available within the footer menu. Selecting **Mark as Unread** will set the status back to Unread. Once the notification is in Unread status, the footer menu option will change to **Mark As Read**. The user can set the status back to Read by selecting this option.

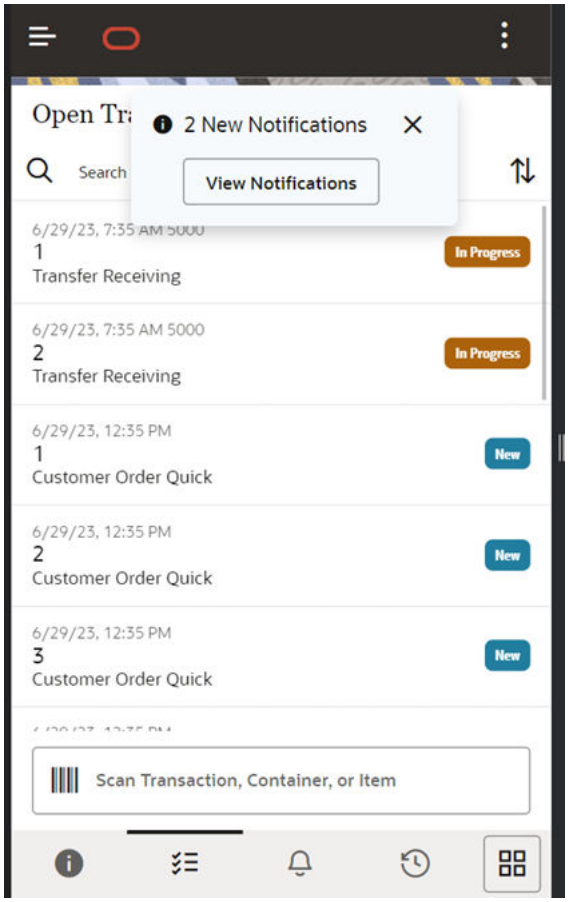
Also within the footer will be a Notes option which navigates to the standard notes dialog for entering in notes about the notification. Lastly, in the footer is a **Go to Transaction** option which allows the user to jump into the transaction associated with the notification for the user's store. This option is only available to users that have access permission for the functional area. Once in the truncation transaction the user will be able to view, edit, delete, and so on, the transaction as they would had they entered it directly assuming the user has proper

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permissions. Once leaving the transaction the user will return back to the Notification Detail screen.

Notification Warning Display

Figure 3-17 Notification Display

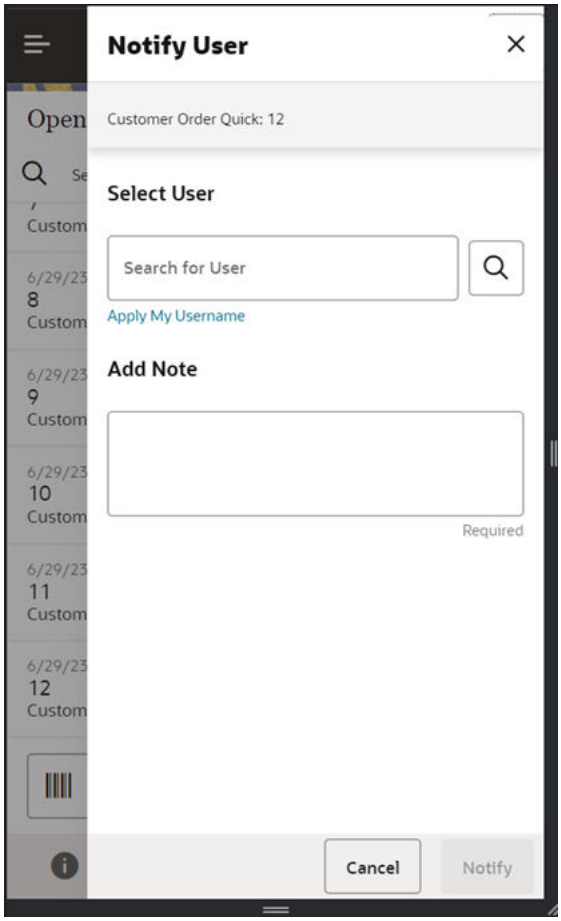


A notification warning bar is displayed at the top of the application on every screen within the mobile application whenever a new notification comes into the system and is saved. The system checks every 'x' seconds for a new notification, where 'x' is a system configured amount of time. If a new notification exists for the user logged into the system, and if the user has the permission to display the notification warning, then the notification will be displayed. The user can access the details for the notification from the notification warning.

Notify User

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Figure 3-18 Notify User



The Notify User screen is displayed by swiping a transaction on Open Transaction and selecting the **Bell** icon. To find a user to notify (not roles), click on the Search for User field. The common Select User screen is displayed to find a user. See Common Chapter.

A note can be added by the user to associate with the notification. The system will create an ad hoc notification for the open transaction to that user. The manually created ad hoc notification appears in the notification list screen of the selected user that was notified, upon logging in to that store. Open transactions can have more than one notification sent.

Ad Hoc Notifications

Ad hoc notifications are notifications that are created in an ad hoc basis by notifying one or more users about an open transaction from the Open Transactions screen.

They are sent on one user at a time and each message is treated individually.

The notification will get updated to 'read' and 'unread' on an individual user/message basis as they are read or marked to 'unread'.

Ad hoc notifications can be created for each of the transaction types from the Open Transactions.

- The notification ID will be system generated.
- The notification name will be set to 'Fwd: < transaction type>'.

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- The transaction type will be set based upon the transaction that the notification was created from.
- Status will be 'Unread' for all users. Status will be updated for individual users as they get read.
- Create Date will be defaulted to the date/time the notification was generated.
- Description: 'Please look at this open transaction'.
- User: The user that generated the notification clicked the 'Notify' button on the open transaction.

System Notifications

For notifications that are created via the system, they are associated to a group (role) and as one user for that notification's role/store reads the notification (or unreads) it, it will update it for the entire group. The idea is that if you send out a notification to all store clerks you do not want to make them all read it.

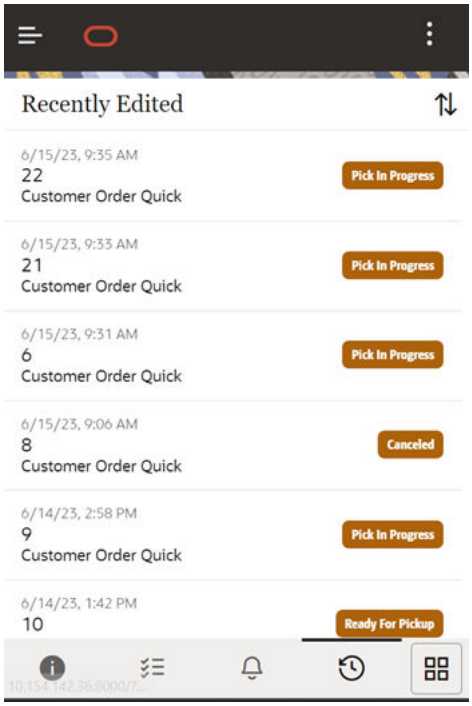
The details of the notification will be populated as follows:

- The notification ID will be system generated.
- The notification name will be the Subject Line from the actual notification.
- The transaction type will be based on transaction that is associated with the notification.
- Transaction ID will be the actual transaction ID for the transaction.
- Status will be 'Unread' for all users of the role. Status will be updated for all of the role users as they get read (or Unread).
- Create Date will be defaulted to the date/time the notification was generated.
- Description: Body per the notification. Note this is restricted to 2000 characters, so it may get truncated.
- User: The user that generated the notification, since these are system generated it may be a user who triggered it, a batch user, or a system user, and so on.

Recently Edited JET Mobile

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Figure 3-19 Recently Edited



Recently Edited is accessed by selecting the Recently Edited icon (looks like a clock) from the Application Panel footer menu.

Recently Edited will display the last ten transactions that have been edited by a user at the user's store. It displays unique transactions, so if the user edited the same transaction more than once it will only display the last instance.

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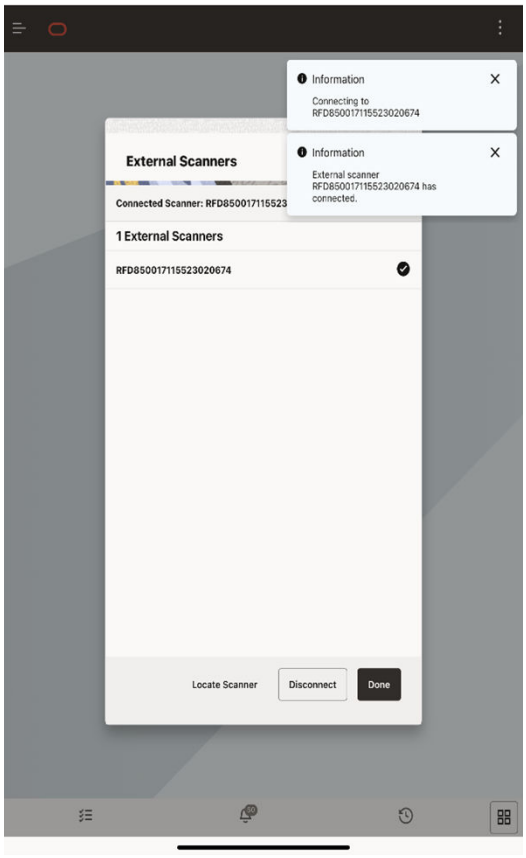
External Scanners JET Mobile

Figure 3-20 External Scanners



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Figure 3-21 External Scanners



This dialog is used to plugin Bluetooth scanner devices to the SOCS application.

When the user accesses this screen, the system detects the paired external devices and allows the user to connect to them in order to use them in the application. If the device is already connected the system indicates it with a tick mark against the listed device.

The user can select the wanted device from the list to connect to. If the system is able to connect to the device it prompts messages while attempting to connect and when connected successfully.

If the device is already connected the user can locate it using the Locate Scanner option which will result in producing a beep sound on the device.

The Disconnect option allows the user to disconnect the device.

The External Scanners screen can be accessed from the Main menu or from Quick Actions.

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4

Lookups

The lookup features provide a robust system for searching information. You can search for items, suppliers, and shipping containers.

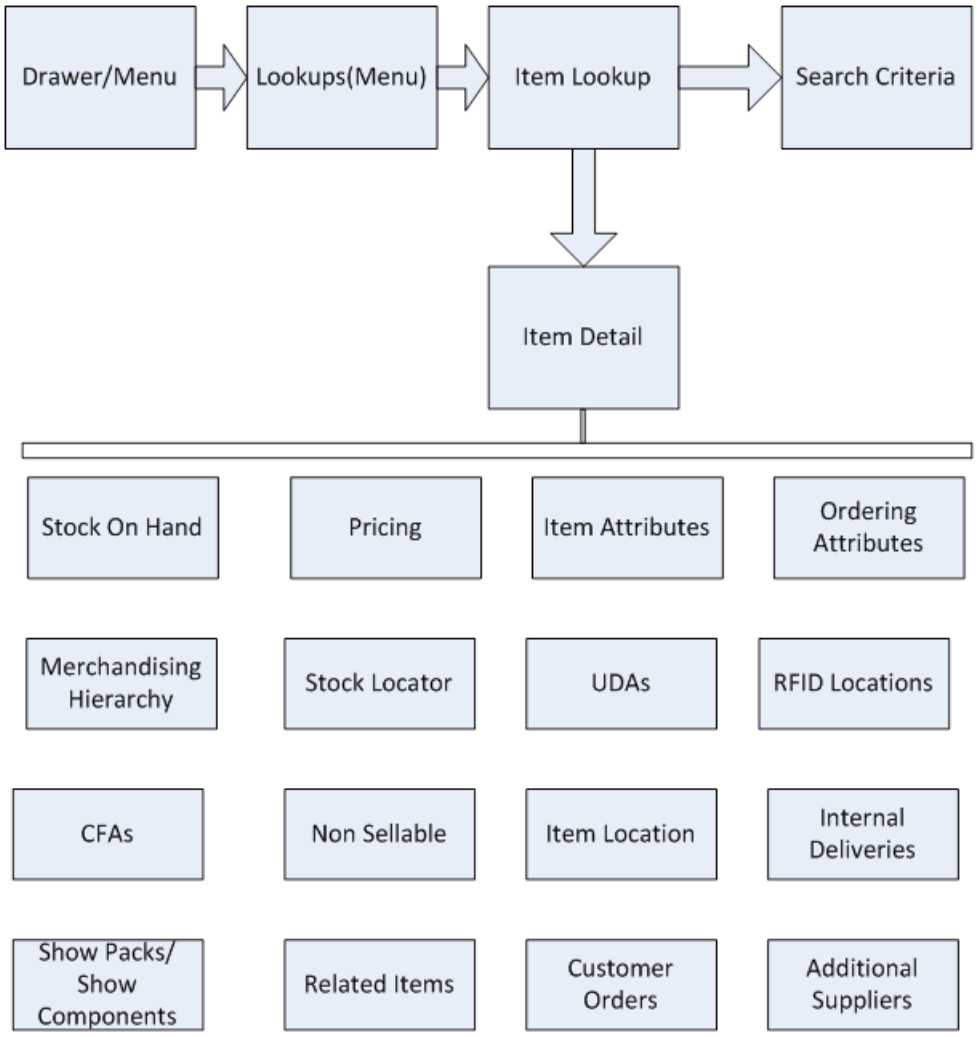
- Item Lookup MAF Mobile
- Universal Item Lookup MAF Mobile
- Item Lookup JET Mobile
- Universal Item Lookup JET Mobile
- Supplier Lookup MAF Mobile
- Supplier Lookup JET Mobile
- Container Lookup MAF Mobile
- Container Lookup JET Mobile
- RFID Locator

Item Lookup MAF Mobile

The Item Lookup functionality provides the business user with the ability to view information related to an item. In addition, the Item lookup can also be used in conjunction with other screens to assign items to a transaction. The system provides real-time information on inventory positions and other item detail information.

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Figure 4-1 Item Lookup Screen Flow



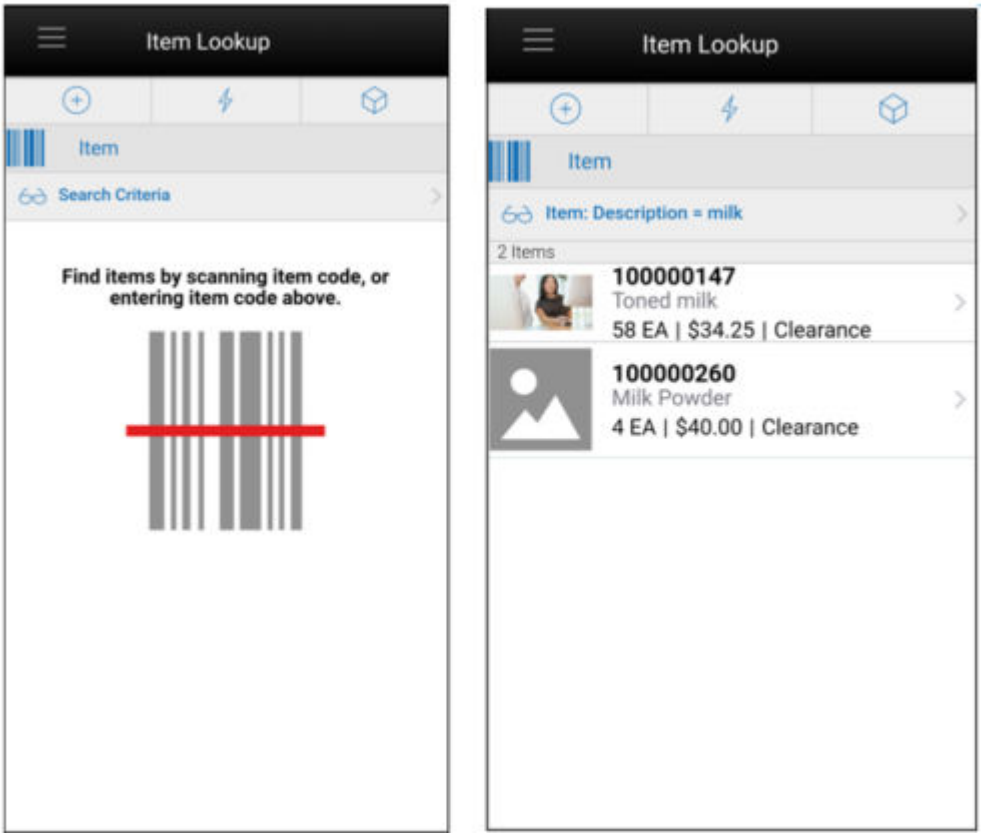
This is a screen flow for the Item Lookup functionality. Selecting Item Lookup from the menu drawer directs to the Item Lookup screen. From Item Lookup, you can search for items and view different details about the item. Details that can be viewed include:

- Stock on Hand
- Pricing
- Item Attributes
- Ordering Attributes
- Merchandise Hierarchy
- Stock Locator
- UDAs
- RFID Locations
- CFAs
- Non-Sellable
- Item Locations

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- Deliveries
- Show Packs
- Show Components
- Related Items
- Customer Orders
- Additional Suppliers

Figure 4-2 Item Lookup Screens



When navigating to Item Lookup, you are taken to a blank list screen where no item results are displayed.

Use the search criteria, eye glasses, to navigate to the Item Lookup Search Criteria screen to enter search criteria for items to find. After applying the search criteria, the results are listed on the screen and the criteria applied is shown next to the eye glasses.

The details of the item such as Item ID, Item Description, Available SOH, Price, Price Type, and Item image (if configured) are displayed in this screen in order to provide certain basic information about the items. The pricing related information (Price and Price Type) are displayed only when the system configuration parameter 'Display Price in Search Result - Execution' is set to 'Yes'.

If the system setting, ‘Filter Merchandise Hierarchy’ is set to ‘Yes’, the list of items returned will be restricted to those departments that the user has department data permissions for. If it is set to ‘No’, the system will return the list of items based upon all departments without restriction.

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Selecting an item from the results list navigates to the item detail for that item.

When scanning or entering an item in the scan bar, the system ignores all entered search criteria and searches for the item entered. If it results in a single item, the system takes the user automatically to the item details. If more than one item is found, it provides an item selection to select the proper item.

The system will validate the ‘Allow Item Lookup for Non-Ranged Items’ system setting. If it is set to ‘Yes’, and if the user scans/enters a non-ranged item, the item will be returned. If the setting is set to ‘No’, and if the user scans/enters in a non-ranged item, the system will not return the item. Note: the system setting ‘Allow Non-ranged Items’ is not validated here, the setting described above takes precedence.

If it results in a single item, the system takes the user automatically to the item details. If more than one item is found, it provides an item selection to select the proper item.

Item Lookup Search Criteria

From Item Lookup, selecting the search criteria button, which looks like a pair of eye glasses, takes you to the Item Lookup Search Criteria screen. This screen is used to search for items using specific search criteria.

The Item Lookup Search Criteria screen will be different and contain different search criteria depending on the Search Mode. The user can choose to find items by item number, supplier, warehouse, finisher, UDA, Inventory Status, or style. Depending on which search mode is selected, the search criteria fields change. All search modes, except for searching by style, have common search criteria consisting of item description, brand, non-ranged indicator, search limit, department, class, and sub-class.

Item Description: This field holds an item description, which you enter to search. You can search on partial description as well, meaning that if the Item Description contains what is entered in this field, results are returned. This search criterion can be used for any other search type except when searching by Style.

Brand: This field holds the brand, where you enter to search. Enter a brand for the item. The system returns all items for the brand specified. This search criterion can be used for any other search type except when searching by Style.

Dept: This field allows you to select from a list of available Departments for the selected group. This search criterion can be used for any other search type except when searching by Style.

Class: This field allows you to select from a list of available classes for the selected department. This field is only enabled if a department has been selected. This search criterion can be used for any other search type except when searching by Style.

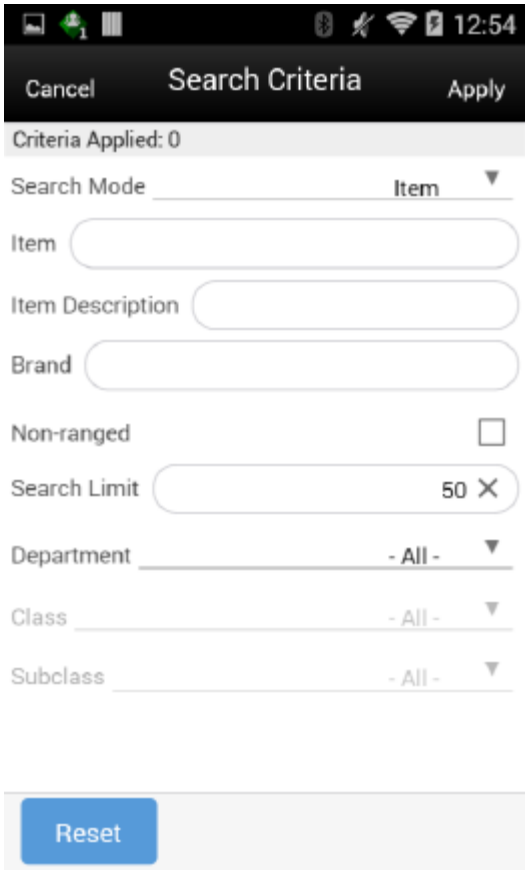
Sub-Class: This field allows you to select from a list of available sub-classes for the selected department/class. This field is only enabled if a department and class has been selected. This search criterion can be used for any other search type except when searching by Style.

Include Non-Ranged: When the Include Non-Ranged check box is checked, the system returns items that exist but may not have been ranged to your store, in other words, the item record does not exist for your store. When it is not checked, only those items that are for your store are returned. If searching for an item by item number, the system ignores this indicator and navigates to the details regardless if the item is ranged or non-ranged. The Include Non-Ranged check box will be displayed on the screen as a search option if the system setting, “Allow Item Lookup for Non-Ranged Items’ is set to ‘Yes’. If the setting is ‘No’, then the check box will not be displayed on the screen and non-ranged items will not be included.

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Searching by Item

Figure 4-3 Search Mode: Item



Item

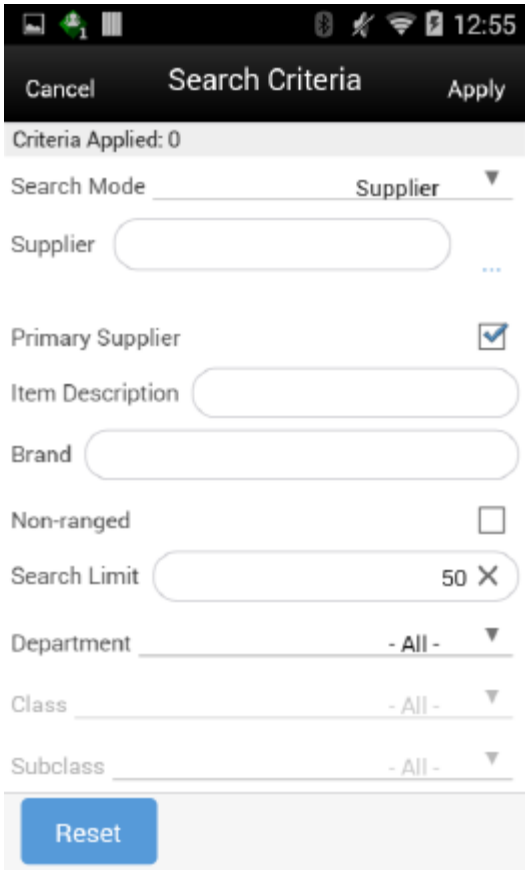
This field holds an item number, which you enter to search. Partial searches are not permitted on the item number. You can enter an item number, TUC, UPC/EAN, Type 2, GS1 Databar, VPN, or SEL (shelf edge label) into this field. The system can locate the specified item.

Entering an item ID to search on ignores all other criteria entered. The system will validate the ‘Allow Item Lookup for Non-Ranged Items’ system setting. If it is set to ‘Yes’, and if the user keys in a non-ranged item, the item will be returned. If the setting is set to ‘No’, and if the user keys in a non-ranged item, the system will not return the item. Note: the system setting ‘Allow Non-ranged Items’ is not validated here, the setting described above takes precedence.

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Searching by Supplier

Figure 4-4 Search Mode: Supplier



Supplier

This field holds a supplier number, which you enter to search. The user can search for items by primary and non-primary suppliers.

Primary Supplier (Check Box)

The Primary Supplier Check Box determines whether to display all items supplied by the entered supplier (based on the Supplier or Supplier Name search fields) or only display items where the entered supplier is the primary supplier for that item:

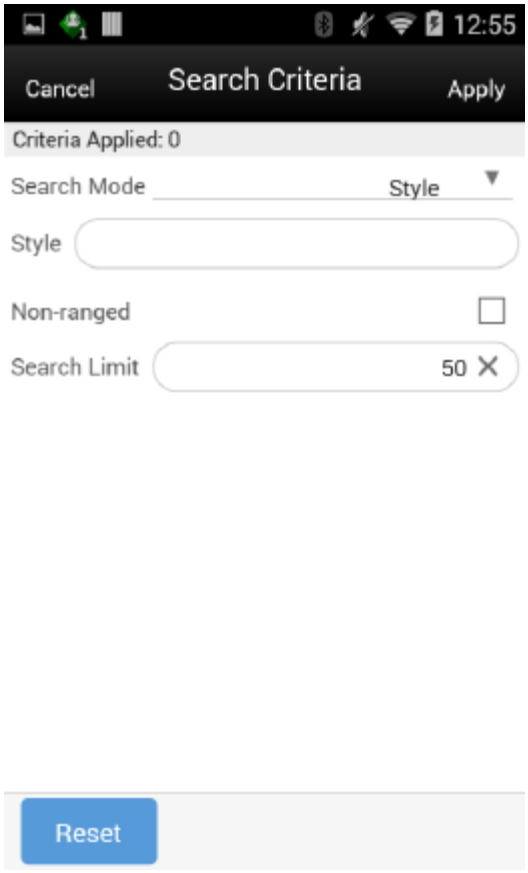
If the indicator is checked, the system only displays items where the entered supplier is the primary supplier of the item. This is the default.

If the indicator is not checked, it displays all items supplied by the supplier ID that was entered in the search criteria field, regardless of whether the entered supplier is the primary supplier. In this case, you may see items in the search results that have a different supplier ID and name than what was entered in the search criteria. This means the item is supplied by the entered supplier but has a different primary supplier.

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Searching by Style

Figure 4-5 Search Mode: Style



Style (Item ID)

You can search on a style item ID. The Item Description, Brand, Department, Class, and Sub-Class search options do not display when the Style Search option is selected. Enter in a style item (style is where the item level is above the transaction level), and the system returns all the transaction level children that are related to the style parent/grandparent.

Example:

Enter Style ID

10001001 Shirt Item level 1, tran level 2

Search Returns

10001011 Shirt 1, green shirt item level 2, tran level 2

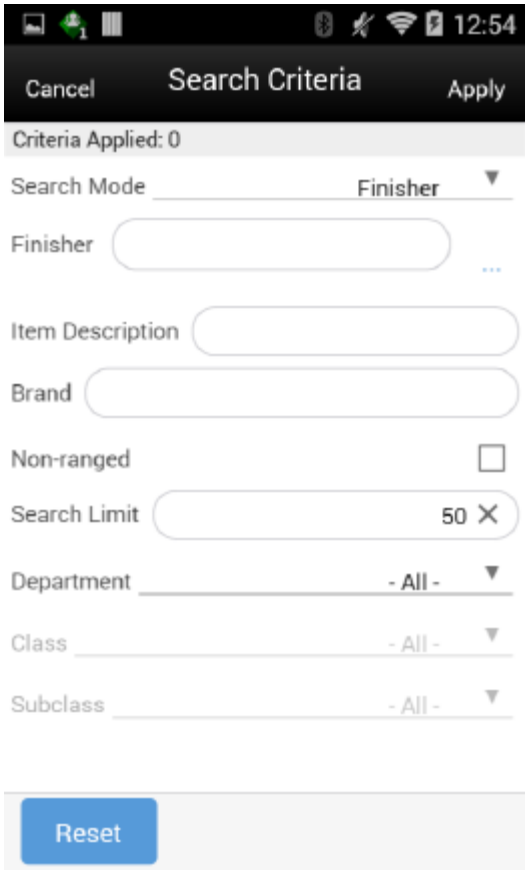
10001012 Shirt 2, blue shirt item level 2, tran level 2

10001013 Shirt 3, red shirt item level 2, tran level 2

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Searching by Finisher

Figure 4-6 Search Mode: Finisher



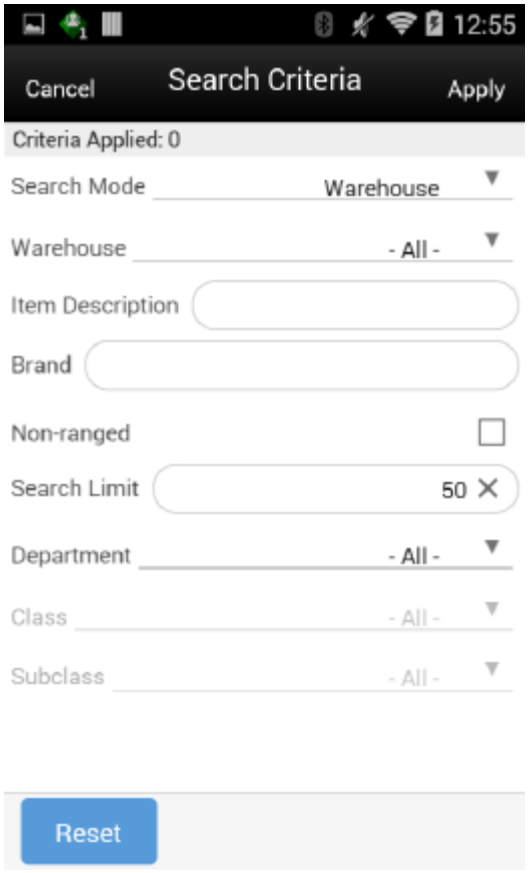
Finisher

You can search for items by Finisher by entering a Finisher number. The system returns all items belonging to the finisher. Searching by Finisher is only available if the system is configured to use Finishers.

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Searching by Warehouse

Figure 4-7 Search Mode: Warehouse



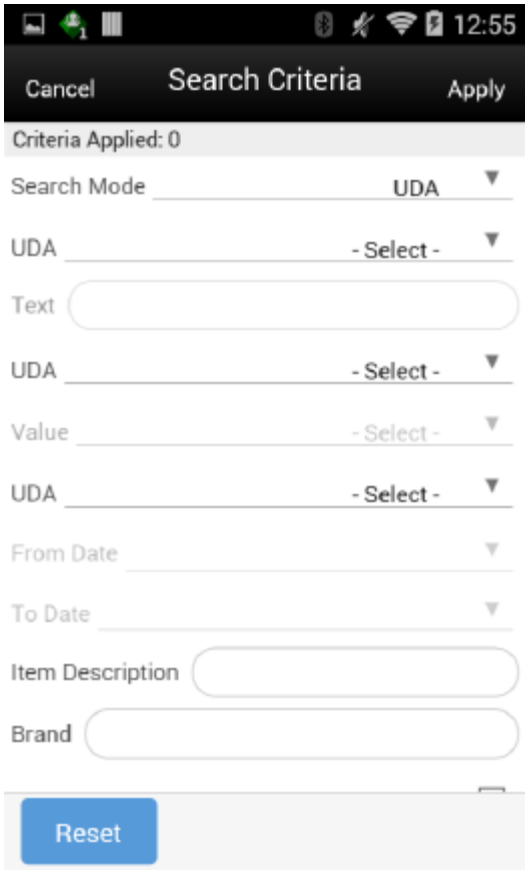
Warehouse

This field is a drop down listing all of the warehouses by number and name in numerical order. You can select a specific warehouse and the system returns all items for the selected warehouse.

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Searching by UDA

Figure 4-8 Search Mode: UDA



UDA

This field allows you to pick a specific User Defined Attribute (UDA) and enter the corresponding search criteria. For an item to be returned, it must match all criteria entered.

Text

This field allows you to enter any part of the UDA text. Wild card searches are also allowed.

Value

This field allows you to select from a list of pre-defined values for the UDA.

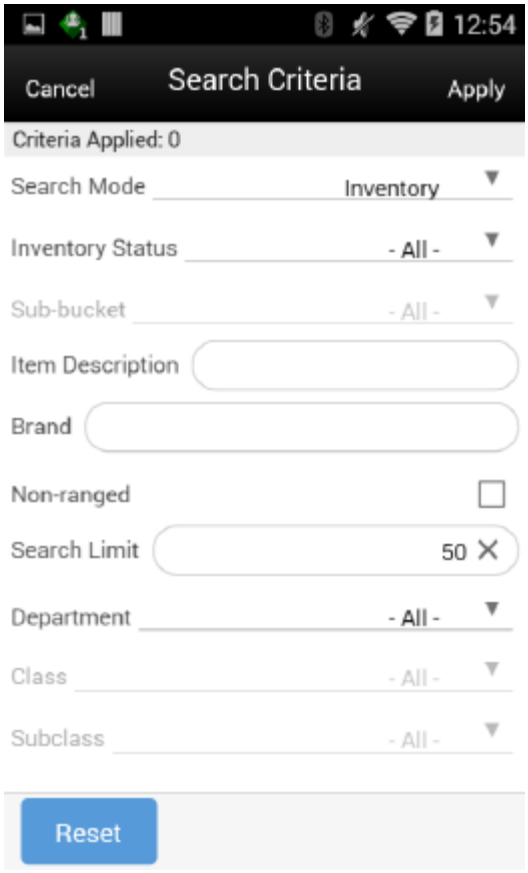
Date Range

This field allows you to enter a range of dates. Any item falling within that range is returned, providing any other criteria also matches.

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Searching by Inventory Status

Figure 4-9 Search Mode: Inventory Status



Inventory Status

This field allows you to search by available or unavailable inventory status. The system returns all items that match the status selected by you. If Available is selected, the system returns the items that have available inventory. If unavailable is selected, the system returns the items that have non-sellable unavailable inventory. This search feature gives you a way to search for items that have unavailable inventory which might need further action. It can be especially useful when looking up items when creating inventory adjustments.

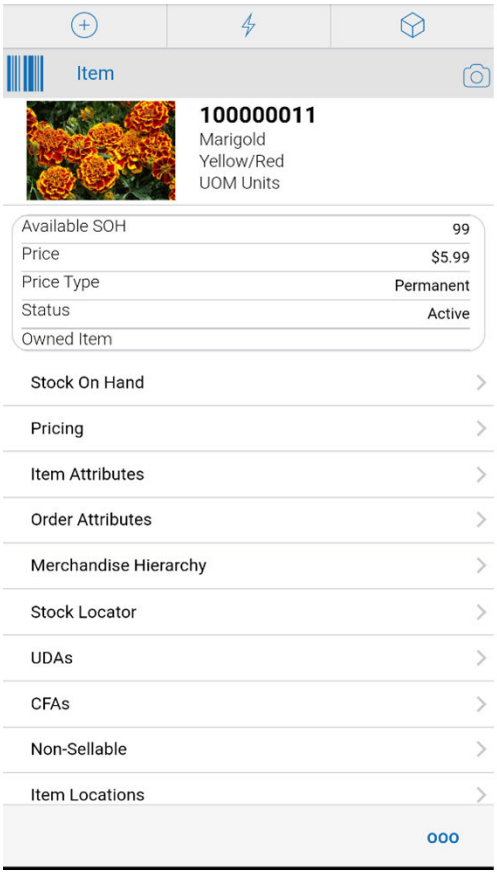
Sub-Bucket

This field allows you to continue to filter down by sub-bucket. Sub-buckets are only an option if the system is configured to use sub-buckets. The Inventory Status must be selected as Unavailable for the Sub-bucket filter to be enabled. The system returns all items that match the selected Inventory Status and Sub-bucket.

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Item Detail

Figure 4-10 Item Detail Screen



Selecting an item on the Item Lookup screen brings you to the **Item Detail** screen. The header shows the item number, description, unit of measure, and item image if configured to show images. Additional header information includes the available stock on hand, price and price type, status, primary supplier ID, and primary supplier name, Item Type (Owned/Consignment/ Concession).

Upon scanning an item, the screen refreshes, and the details for the newly found item are displayed. The bottom of the screen has various features, that when selected, navigate to a screen to display the details for that feature such as stock on hand, pricing, item attributes, and so on.

The details include the following:

- Stock on Hand
- Pricing
- Item Attributes
- Ordering Attributes
- Merchandise Hierarchy

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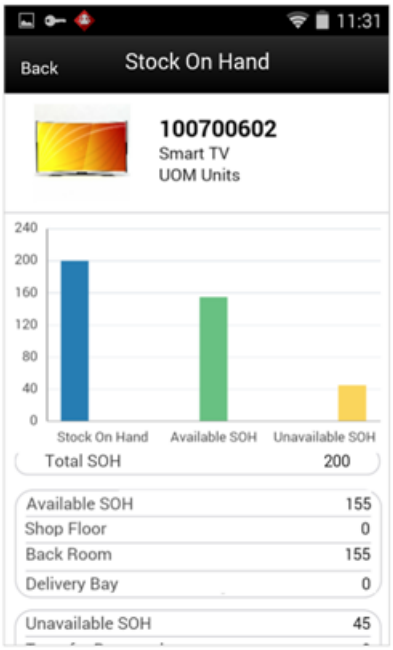
- Stock Locator
- UDAs
- RFID Locations
- CFAs
- Non-Sellable (only if configured for sub-buckets)
- Item Locations (only if the Display Sequence Locations system admin = Yes)
- Deliveries
- Show Packs
- Show Components (only for pack items)
- Related Items
- Customer Orders
- Additional Suppliers
- UINs (if store configured for UINs and item is a UIN item)

The footer menu includes options:

- **Print**: Prints out the Item report.
- **Investigate**: Adds the item being looked up to an investigate type item basket. If one or more 'in progress' status 'Investigate' type item baskets exist for the user's store, the system will add the item to the newest one. If one does not exist, the system will create one. The item basket will be 'static' and available in the Item Basket dialog of both the desktop and mobile.

Stock On Hand

Figure 4-11 Stock On Hand Screen



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This is the Stock on Hand Details for an item. It was accessed by selecting the Stock on Hand option from the Item Detail screen within Item Lookup. This screen shows all the various stock on hand buckets including total SOH, available SOH, shopfloor, backroom, delivery bay, unavailable SOH, transfer reserved, RTV reserved, customer order, and nonsellable.

> **Note**
>
> The shopfloor and backroom buckets are only displayed when the parameter `Display Shopfloor/Backroom quantity= Yes`.
>
> The delivery bay bucket is only displayed when the parameter called `Replenishment - Delivery bay inventory` is set to **Yes**.

Stock On Hand Info

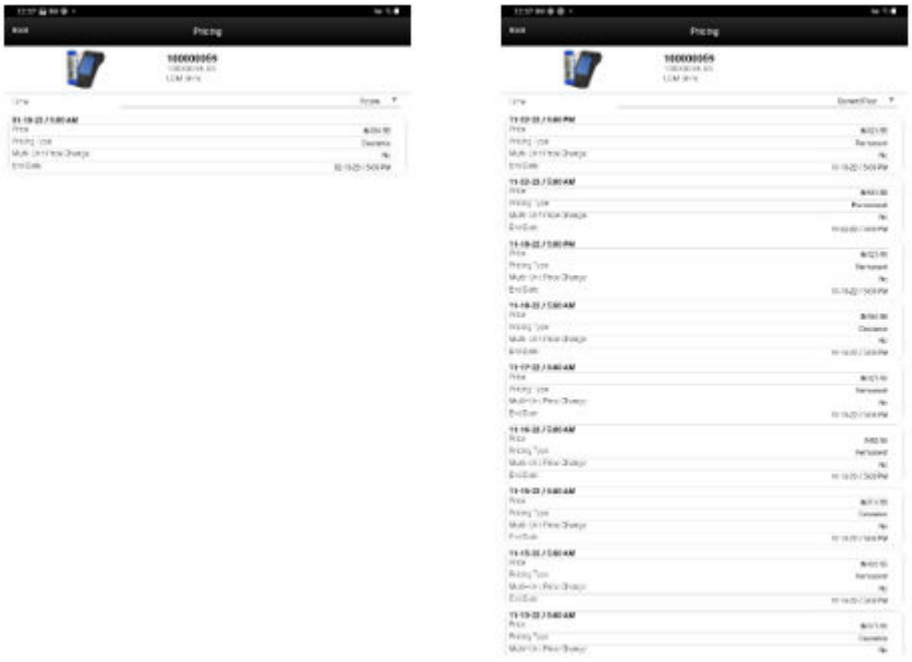
Total Stock on Hand = Available + Unavailable

Unavailable = Transfer Reserved + RTV Reserved + Non-sellable + Customer Order

Available = Shopfloor + Backroom + Delivery Bay

Pricing

Figure 4-12 Pricing Screen



Pricing is accessed by selecting the **Pricing** option on Item Detail. The Pricing screen displays the Pricing Details for the item and your store. The user will be able to select the time drop down option to state if they want to show the prices that are current / past or those that are future events. Future events can only be seen by users that have the Access Future Price Events permission.

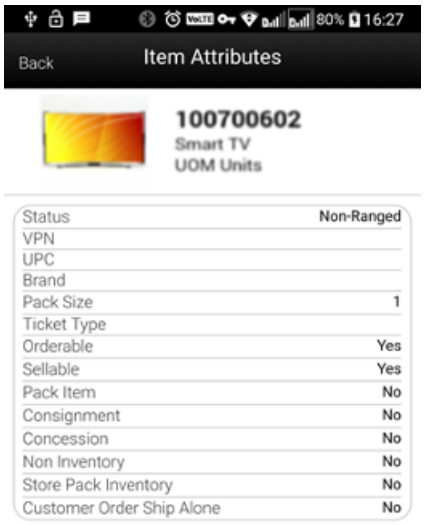
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Current / Past price changes will show all price histories for the item at the user's store. If all price events are regular price changes, then only regular price events will be displayed. If there is at least on clearance, then the system will display the clearance and the regular price changes, however many exist. If there are no historical prices, there will only be one current price displayed.

Each price event is represented in as a set. The sets of price events are ordered by Effective Date/Time with most recent on the top (descending). The pricing screen will display the end date of the price event, be it a promotion, clearance, or regular price change.

Item Attributes

Figure 4-13 Item Attributes Screen



Item Attributes is accessed by selecting **Item Attributes** from Item Detail. It displays the Item Attributes for the item at your store.

Item Attributes

Additional information may also be helpful to view about an item. The following are some additional item attributes available on this screen.

Status: Item status as the location.

VPN: Vendor product number for the primary supplier of the item.

UPC: UPC for the item.

Brand: Brand of the item.

Pack Size: This field holds the pack size (number of items in a supplier case) of this item:

The pack size is populated from the item/supplier/country record for the primary supplier.

For non-ranged items, this value is pulled from the master item data, for the default supplier.

Ticket Type: Merchandising suggested ticket type code/format.

Orderable: Yes/No; indicates if the item can be ordered.

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Sellable: Yes/No; indicates if the item is sellable.

Pack Item: Yes/No; indicates if the item is a pack item.

Consignment Item: Yes/No; indicates if the item is a consignment item.

Concession Item: Yes/No; indicates if the item is a concession item.

Non-inventory: Yes/No; indicates if the item is flagged as non-inventory.

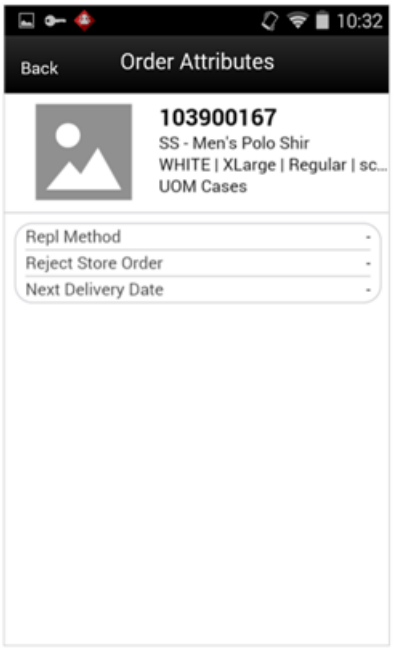
Store Pack Inventory: Yes/No; indicates tells the system when an item will only be sold and tracked as a pack.

Customer Order Ship Alone: Yes/No; tells the system if an item needs to be shipped alone in customer order deliveries or not.

> **Note**
>
> SOH and any reference to inventory will not be available for non-inventory, consignment, or concession items.

Order Attributes

Figure 4-14 Order Attributes Screen



Order Attributes is accessed by selecting **Order Attributes** from Item Detail. It displays the Ordering Attributes of Replenishment Method, Reject Store Order, and Next Delivery Date (if they exist) for the item at your store.

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Merchandise Hierarchy

Figure 4-15 Merchandise Hierarchy Screen



The Merchandise Hierarchy screen is accessed by selecting **Merchandise Hierarchy** from Item Detail. This screen displays the merchandise hierarchy associated to the item.

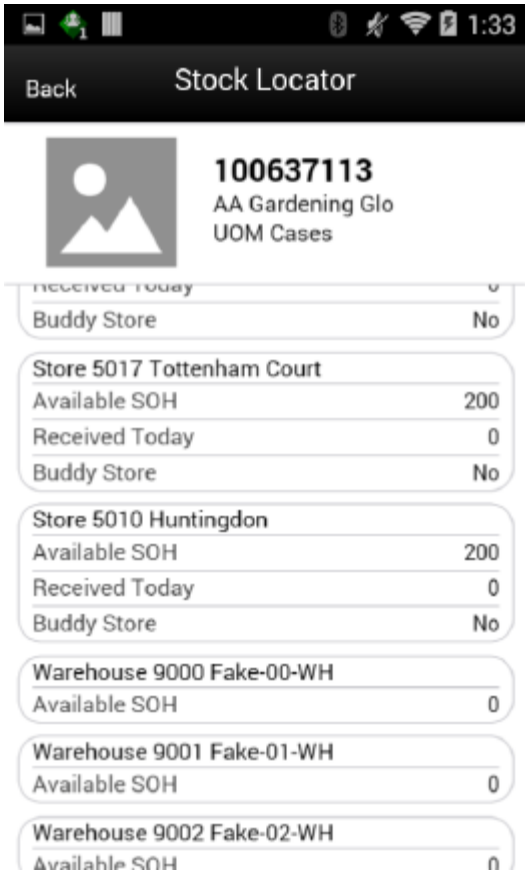
If the item has differences, those are also displayed:

- <Diff1> <Diff 1 Value> if it exists
- <Diff2> <Diff 2 Value> if it exists
- <Diff3> <Diff 3 Value> if it exists
- <Diff 4> <Diff 4 Value> if it exists

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Stock Locator

Figure 4-16 Stock Locator Screen



The Stock Locator screen is accessed by selecting **Stock Locator** from Item Detail. This screen shows stock on hand for the item at other locations, which could be stores and warehouses. Each store or warehouse is grouped together in a set.

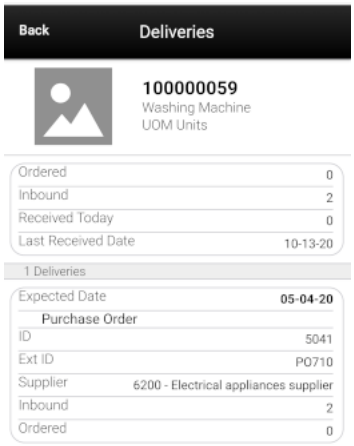
Stores are restricted to only SIOCS Managed stores. Stores have available SOH, received today and buddy store listed. If transfer zones are used, only the stores within the transfer zone should appear. If no transfer zone is associated, the store is available for all transfer zones. The stores listed must have the logged in store present in its shipping network to be listed in this screen.

Warehouses will only display the available SOH. The locations are ordered first by buddy stores (Yes) at the top and second by available SOH (greatest at the top).

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Deliveries

Figure 4-17 Deliveries Screen



The Deliveries screen is accessed by selecting **Deliveries** from Item Detail. All quantities are in the SUOM.

The header contains:

Ordered: Displays the total quantity remaining on the order. (Transfers + Purchase Orders)

Inbound: Is the total shipped quantity from transfers, allocations, and POs on an ASN that have not been received yet.

Received Today: Is the total received quantity for the current date.

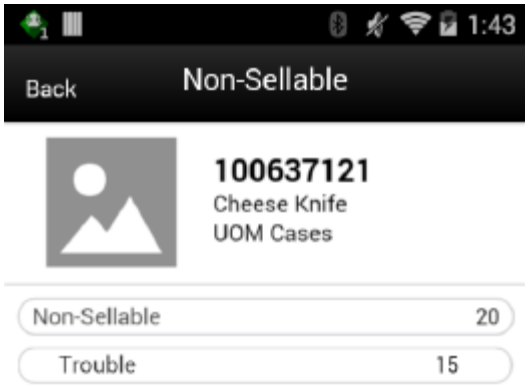
Last Received Date: The date when the item was last received (through a transfer delivery or a DSD/PO).

The list portion of the screen represents the deliveries for the item. You can scroll through the list of Deliveries that are coming from a Transfer or Purchase Order. The deliveries are ordered by Delivery Date with the oldest delivery at the top (ascending). If there are no deliveries, the list will be blank.

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Non-Sellable

Figure 4-18 Non-Sellable Screen



Clicking the **Non-Sellable** option on Item Detail displays the Non-Sellable sub-bucket information for the item at your store. The system displays all sub-buckets that have inventory for the item at your store along with the corresponding inventory.

The Non-Sellable menu option only displays when the system is configured for sub-buckets.

The Non-Sellable field is displayed in the Stock On Hand tab as well. This field represents how much stock is unavailable not associated to customer orders, RTVs or transfers. It is increased or decreased every time an inventory adjustment is made to or from unavailable inventory. It also gets updated when receiving damaged items into the store as well as returning unavailable items.

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Components

Figure 4-19 Components Screen



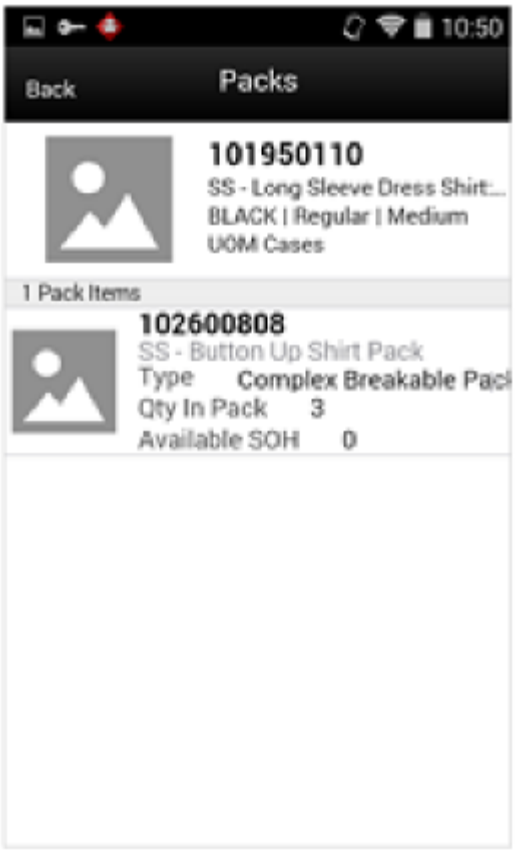
Selecting the **Show Components** option on Item Detail displays the components that exist for the item on the Components screen. The **Show Components** option is only available for those items which are a Pack item. All quantities are in the SUOM.

Tapping a component item navigates you to the item detail for that item. You remain in that item and do not return to the original item.

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Packs

Figure 4-20 Packs Screen



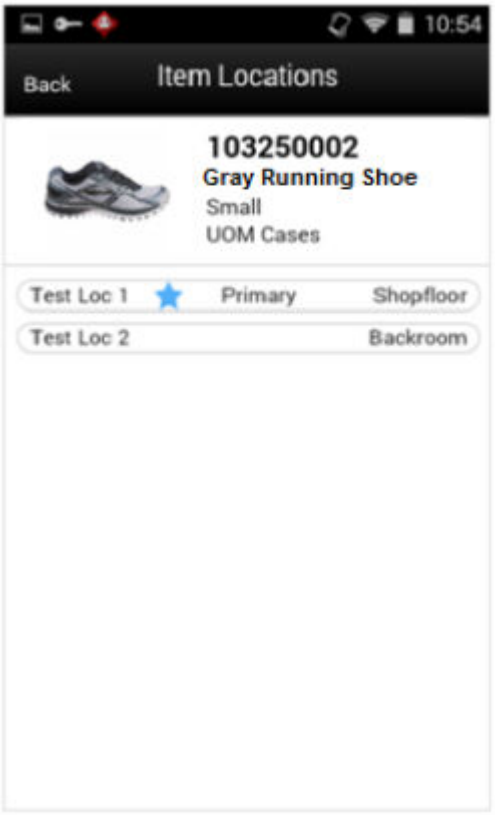
Selecting the **Show Packs** option on Item Detail displays the packs that exist for the item on the Packs screen. The **Show Packs** option is available even if the item is not part of a pack. If it is not part of a pack, no content is displayed for the item. All quantities are in the SUOM.

Tapping a pack item navigates you to the item detail for that item. You remain in that item and do not return to the original item.

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Item Locations

Figure 4-21 Item Locations Screen



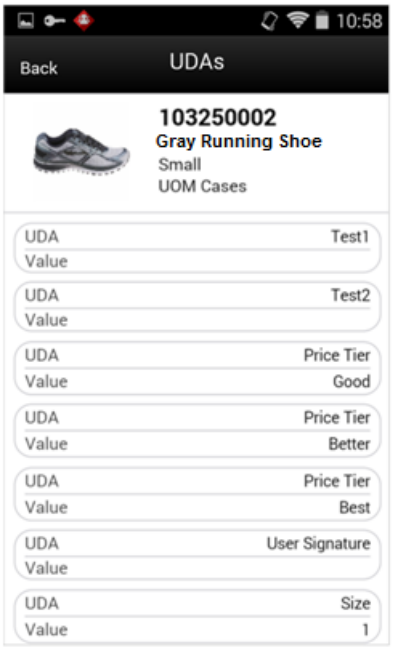
Selecting the **Item Locations** option on Item Detail displays the sequenced locations that exist for the item on the Item Locations screen. The **Item Locations** menu option is only displayed when the system is configured for `Display Sequence Fields = Yes`. If the system is configured to display sequence fields but there are no locations defined for the item, the screen is blank.

The macro locations with the area are displayed. If the location is a primary location, it is indicated with a star.

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UDAs

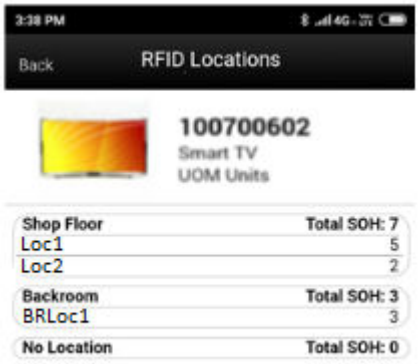
Figure 4-22 UDAs Screen



Selecting the **UDA** menu option displays the UDA information for the item at your store on the UDAs screen. Each UDA and value are represented in a set. The list is ordered by UDA. If there are no records, the details are blank.

RFID Locations

Figure 4-23 RFID Locations Screen



Selecting **RFID Locations** from Item Detail displays the RFID location wise inventory. This menu is available only if the item is RFID tag enabled item.

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RFID locations are defined in the RFID solution and uploaded into system.

The inventory positions shown here are the accumulated numbers of the tags present in the location.

Item CFAs

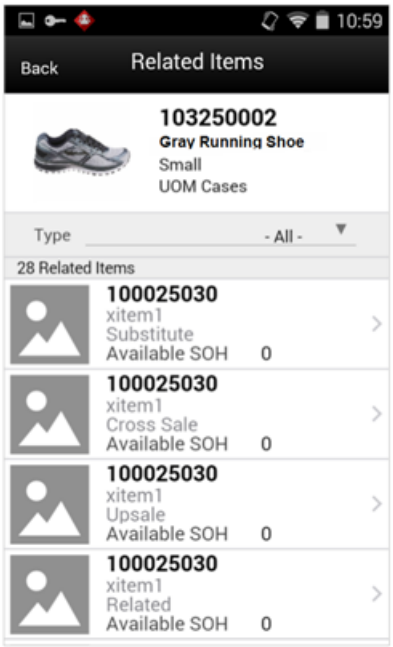
Figure 4-24 Item CFAs Screen



Selecting the **CFA** option displays the CFA (Custom Flexible Attribute) information for the item at your store, on the CFAs screen. The CFAs are setup at merchandising system and the Enterprise Inventory system subscribe to this information. Each CFA and value are represented in a set. The list includes CFAs created at the item level and at the item-store level, if any. If there are no CFAs available, a message that no CFAs are available is displayed in the screen. The list is ordered by CFA.

Related Items

Figure 4-25 Related Items Screen



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The Related Items screen is accessed by selecting the **Related Items** menu option on the Item Detail screen. The Related Items screen displays the related items for the item at your store. All quantities are in the SUOM. The related item types of cross sale, up sale, substitute, and style are listed. There is a type filter at the top of the screen allowing you to filter by the type of related item. All items display, even if they are not ranged to the store.

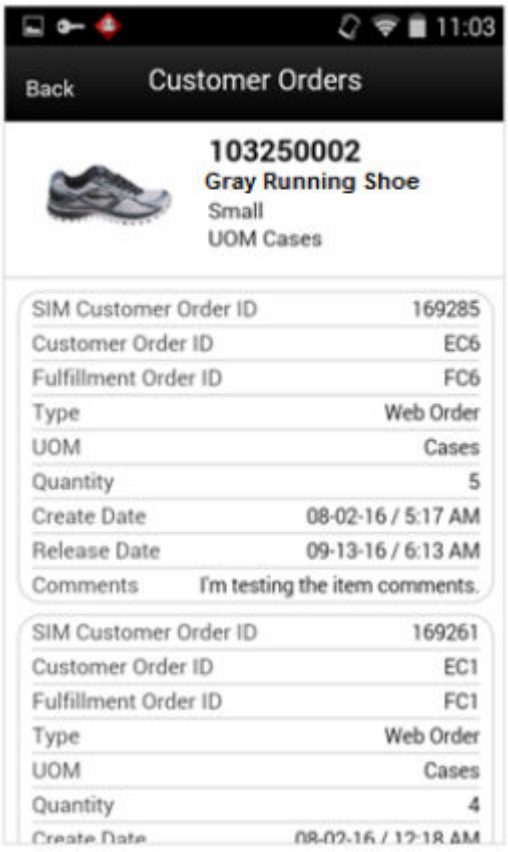
Only Active related items are listed, where today's date is within the effective date and end date for the related item. If there is no effective date, the item is assumed to be active.

If you select a related item record in the list, you navigate to the Item Detail screen for that item. You are in the details for that item. There is not a way to navigate back to the original item. If there are no related items, the details are blank.

> **Note**
>
> The Substitute item types are used within the Customer Order Picking and Shelf Replenishment Picking dialogues when a substitute item is allowed.

Customer Orders

Figure 4-26 Customer Orders Screen



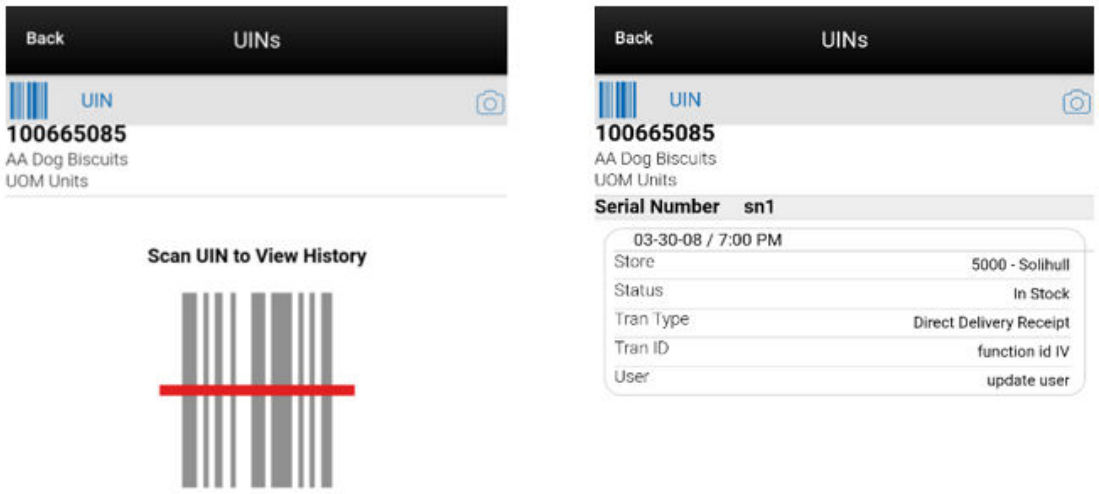
Selecting the **Customer Orders** option on Item Detail displays the customer orders that exist for the item and store. All customer order details are grouped together in a set. The Customer

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Order sets are ordered by Customer Order ID in ascending order. If there are no open customer orders for the item at the user's store, nothing displays on this screen. All quantities are in the SUOM.

UINs

Figure 4-27 UINs Screen



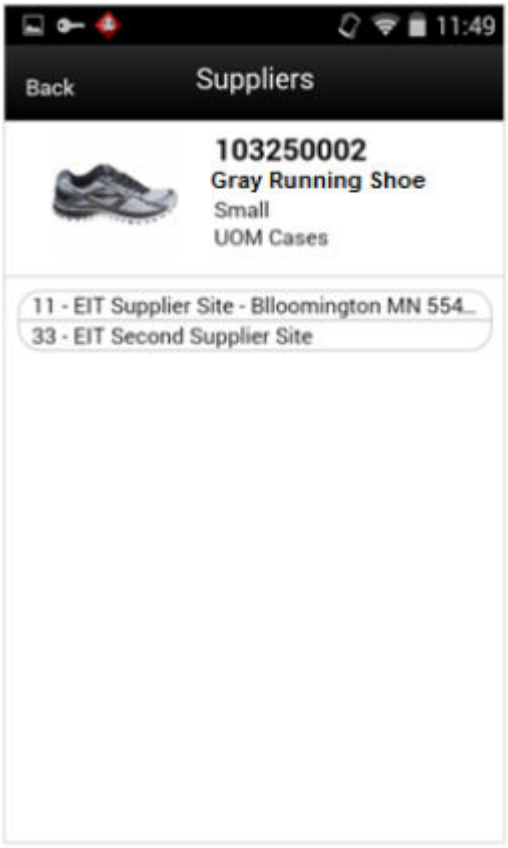
Selecting the UINs option on Item Detail displays the UINs screen. The UINs option will only be available if the store has UIN Processing enabled set to 'Yes' and the item being looked up is a UIN or AGSN.

The user can scan or enter the UIN and the system will display the history for that UIN. Fields will include: store, date, status, transaction type, transaction ID and user for the UIN.

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Suppliers

Figure 4-28 Suppliers Screen



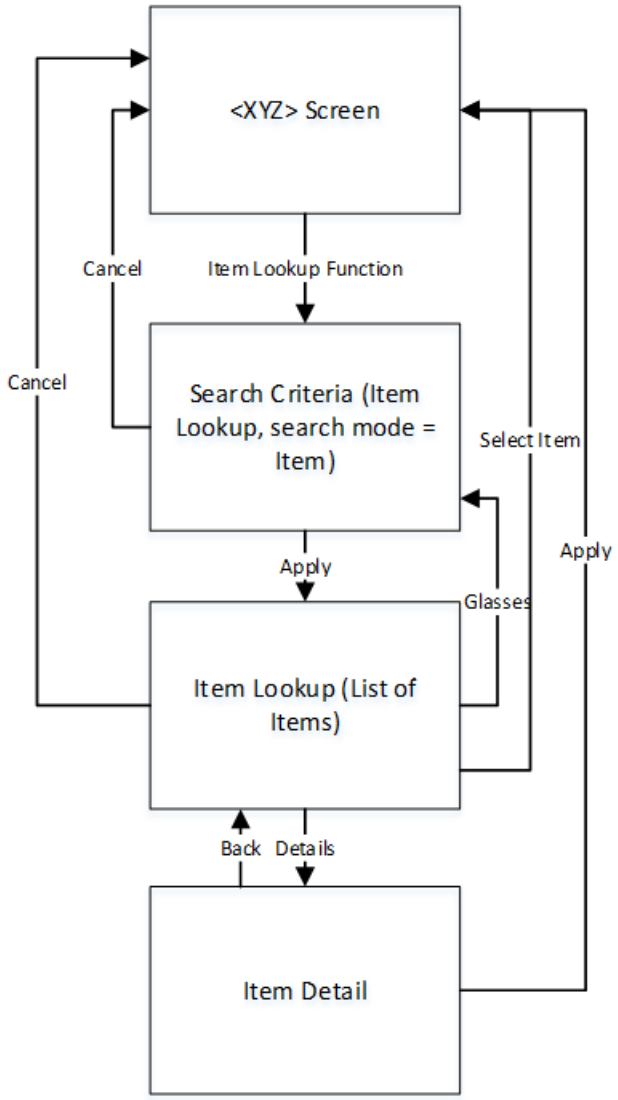
Selecting the **Additional Suppliers** option on Item Detail displays the Suppliers screen. This screen lists the additional suppliers that exist for the item. The primary supplier is not displayed. If there are no additional suppliers, this screen is blank.

Universal Item Lookup MAF Mobile

Universal Item Lookup is the Item Lookup dialog that is accessed from within another transaction or other area of the application. For example, when creating an inventory adjustment, if the barcode is not available and the item is not known, the user can lookup the item within the universal item lookup dialog and then navigate back to Inventory Adjustments.

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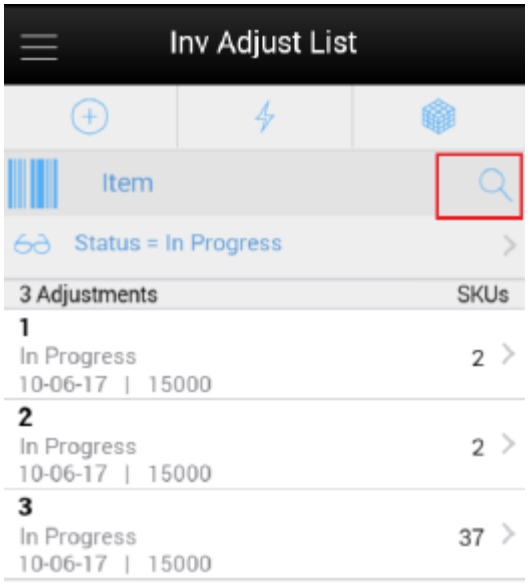
Figure 4-29 Universal Item Lookup Screen Flow



Access Universal Item Lookup via the magnifying glass. You will be directed to the Item Lookup Search Criteria screen. After entering search criteria, the list of items will be returned. From here an item can be selected from the list and applied to the original item field from where the universal item lookup was executed. Or you can then choose to view the details of a specific item in Item Detail and apply from there.

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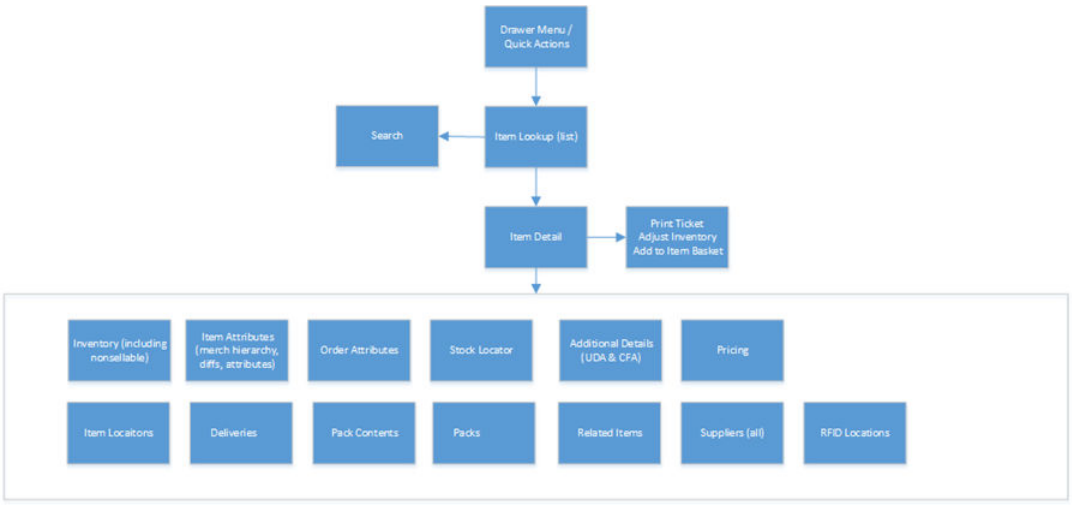
Figure 4-30 Inv Adjust list



The item lookup dialog will be accessed via other areas within the application when an item can be scanned or typed in. Use the magnifying glass to navigate into the Item Lookup Search Criteria screen. Search for an item and once applied you will exit out of Item Lookup and return to the dialog in which you started with the selected item applied.

Item Lookup JET Mobile

Figure 4-31 Item Lookup Screen Flow



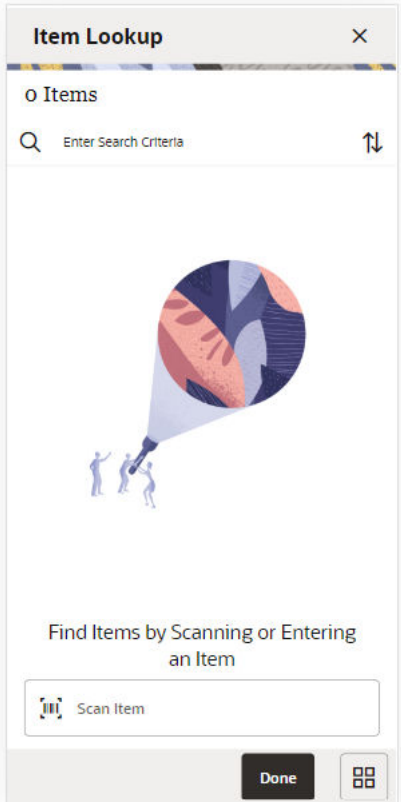
This is a screen flow for the Item Lookup functionality. Selecting Item Lookup from the menu drawer or quick actions directs to the Item Lookup screen. From Item Lookup, you can search for items and view different details about the item. Details that can be viewed include:

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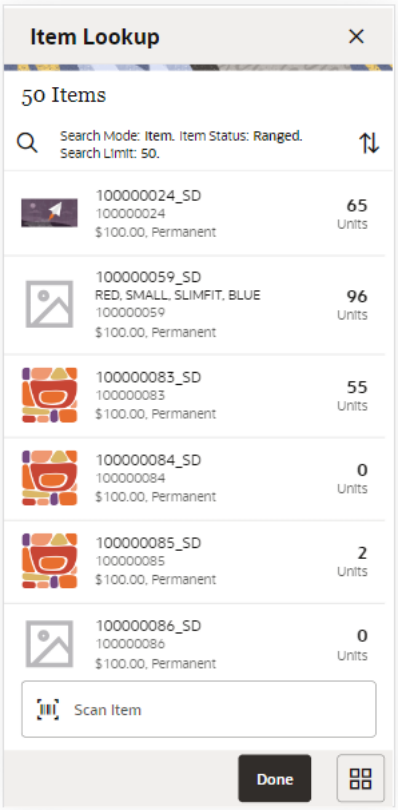
- Inventory
- Item Attributes
- Order Attributes
- Stock Locator
- Additional Details: UDA & CFA
- Pricing
- Item Locations
- Deliveries
- Pack Contents
- Packs
- Related Items
- Suppliers
- RFID Locations
- UINs

Figure 4-32 Item Lookup Screens

Item Lookup Screens



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When navigating to Item Lookup, you are taken to a blank list screen where no item results are displayed.

Use the search criteria, magnifying glass, to navigate to the Item Lookup Search Criteria screen to enter search criteria for items to find. After applying the search criteria, the results are listed on the screen and the criteria applied is shown.

The details of the item such as Item ID, Item Description, Available SOH, Price, Price Type, and Item image (if configured) are displayed in this screen in order to provide certain basic information about the items. The pricing related information (Price and Price Type) are displayed only when the system configuration parameter 'Display Price in Search Result - Execution' is set to 'Yes'.

If the system setting, ‘Filter Merchandise Hierarchy’ is set to ‘Yes’, the list of items returned will be restricted to those departments that the user has department data permissions for. If it is set to ‘No’, the system will return the list of items based upon all departments without restriction. Selecting an item from the results list navigates to the item detail for that item.

When scanning or entering an item in the scan bar, the system ignores all entered search criteria and searches for the item entered. If it results in a single item, the system takes the user automatically to the item details. If more than one item is found, it provides an item selection to select the proper item.

The system will validate the ‘Allow Item Lookup for Non-Ranged Items’ system setting. If it is set to ‘Yes’, and if the user scans/enters a non-ranged item, the item will be returned. If the setting is set to ‘No’, and if the user scans/enters in a non-ranged item, the system will not return the item. Note: the system setting ‘Allow Non-ranged Items’ is not validated here, the setting described above takes precedence.

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If it results in a single item, the system takes the user automatically to the item details. If more than one item is found, it provides an item selection to select the proper item.

Item Lookup Search Criteria

From Item Lookup, selecting the search criteria button, magnifying glass, takes you to the Item Lookup Search Criteria screen. This screen is used to search for items using specific search criteria.

The Item Lookup Search Criteria screen will be different and contain different search criteria depending on the Search Mode. The user can choose to find items by item number, supplier, warehouse, finisher, UDA, Inventory Status, or style. Depending on which search mode is selected, the search criteria fields change. All search modes, except for searching by style, have common search criteria consisting of item description, brand, non-ranged indicator, search limit, department, class, and sub-class.

Item Description: This field holds an item description, which you enter to search. You can search on partial description as well, meaning that if the Item Description contains what is entered in this field, results are returned. This search criterion can be used for any other search type except when searching by Style.

Brand: This field holds the brand, where you enter to search. Enter a brand for the item. The system returns all items for the brand specified. This search criterion can be used for any other search type except when searching by Style.

Dept: This field allows you to select from a list of available Departments for the selected group. This search criterion can be used for any other search type except when searching by Style. If the system setting, “Filter Merchandise Hierarchy’ is set to ‘Yes’, then the system will only list those departments that the user has data permissions for. If it is set to ‘No’, then all departments will be listed.

Class: This field allows you to select from a list of available classes for the selected department. This field is only enabled if a department has been selected. This search criterion can be used for any other search type except when searching by Style.

Sub-Class: This field allows you to select from a list of available sub-classes for the selected department/class. This field is only enabled if a department and class has been selected. This search criterion can be used for any other search type except when searching by Style.

Item Status: This field is a drop down listing all the various statuses of an item and enables you to lookup for items in a particular status. List of values include 'Ranged', 'Active', 'Discontinued', 'Deleted', 'Inactive', 'Temporary' (Ranged in the Inventory system and not yet approved in the Merchandising system).

Selecting **Ranged**, the system will return items in the store in statuses Active, Discontinued, Deleted, Inactive, Temporary.

Selecting **Active**, the system will return items in the store in status 'Active'. Same case with Discontinued, Deleted, Inactive, Temporary statuses as well.

Clearing out the search, the system returns items in all statuses from the Item master table. This can be used if you want to include 'Non-ranged' items.

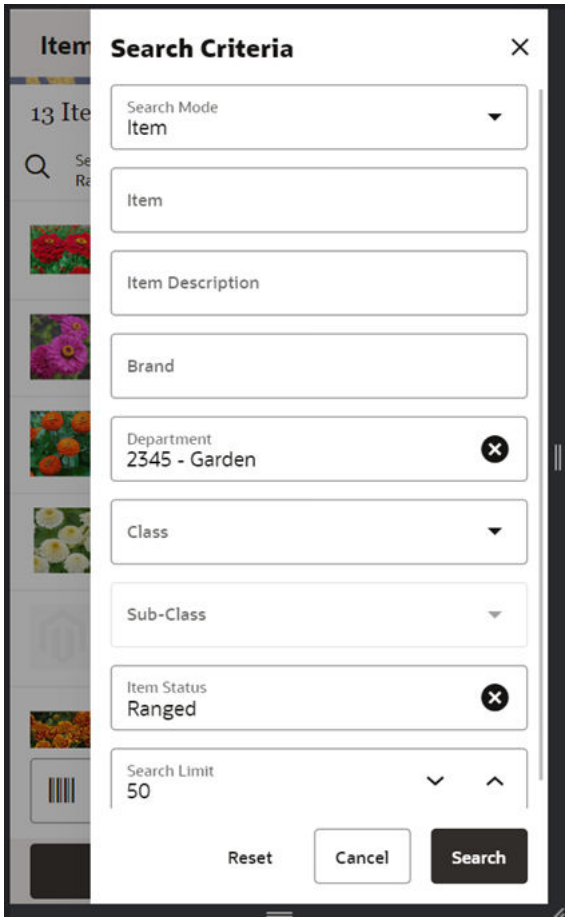
> **Note**
>
> The system does not validate the system setting ‘Allow Non-Ranged Items’.

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The system will validate the ‘Allow Item Lookup for Non-Ranged Items’ system setting. If it is set to ‘Yes’, all statuses of items, including non-ranged, will be returned. If this setting is set to ‘No’ then non-ranged items will not be returned in the list of items.

Searching by Item

Figure 4-33 Search Mode: Item



Item

This field holds an item number, which you enter to search. Partial searches are not permitted on the item number. You can enter an item number, TUC, UPC/EAN, Type 2, GS1 Databar, VPN, or SEL (shelf edge label) into this field. The system can locate the specified item.

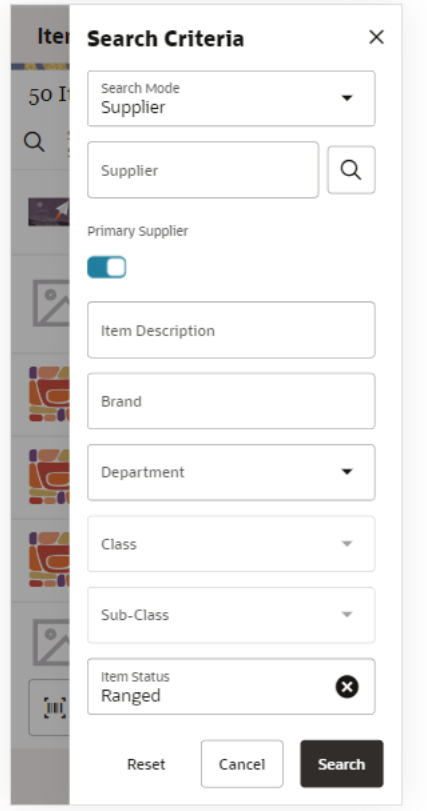
Entering an item ID to search on ignores all other criteria entered. The system will validate the ‘Allow Item Lookup for Non-Ranged Items’ system setting. If it is set to ‘Yes’, and if the user keys in a non-ranged item, the item will be returned. If the setting is set to ‘No’, and if the user keys in a non-ranged item, the system will not return the item. Note: the system setting ‘Allow Non-ranged Items’ is not validated here, the setting described above takes precedence.

> **Note**
>
> Searching by item number requires the entire item number, not a partial item number.

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Searching by Supplier

Figure 4-34 Search Mode: Supplier



Supplier

This field holds a supplier number, which you enter to search. The user can search for items by primary and non-primary suppliers.

Primary Supplier (Check Box)

The Primary Supplier Switch determines whether to display all items supplied by the entered supplier (based on the Supplier or Supplier Name search fields) or only display items where the entered supplier is the primary supplier for that item:

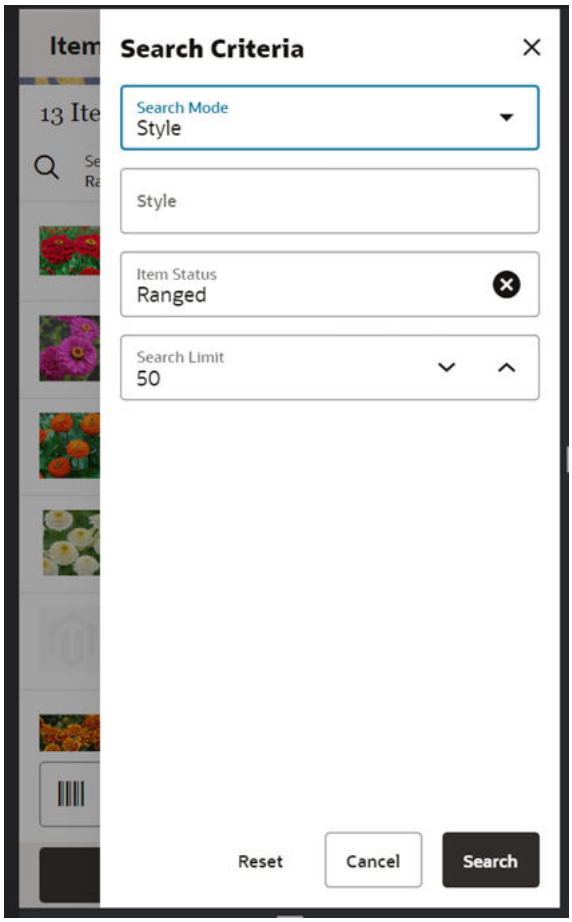
If the switch is turned on, the system only displays items where the entered supplier is the primary supplier of the item. This is the default.

If the switch is not turned on, it displays all items supplied by the supplier ID that was entered in the search criteria field, regardless of whether the entered supplier is the primary supplier. In this case, you may see items in the search results that have a different supplier ID and name than what was entered in the search criteria. This means the item is supplied by the entered supplier but has a different primary supplier.

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Searching by Style

Figure 4-35 Search Mode: Style



Style (Item ID)

You can search on a style item ID. The Item Description, Brand, Department, Class, and Sub-Class search options do not display when the Style Search option is selected. Enter in a style item (style is where the item level is above the transaction level), and the system returns all the transaction level children that are related to the style parent/grandparent.

Example:

Enter Style ID

10001001 Shirt Item level 1, tran level 2

Search Returns

10001011 Shirt 1, green shirt item level 2, tran level 2

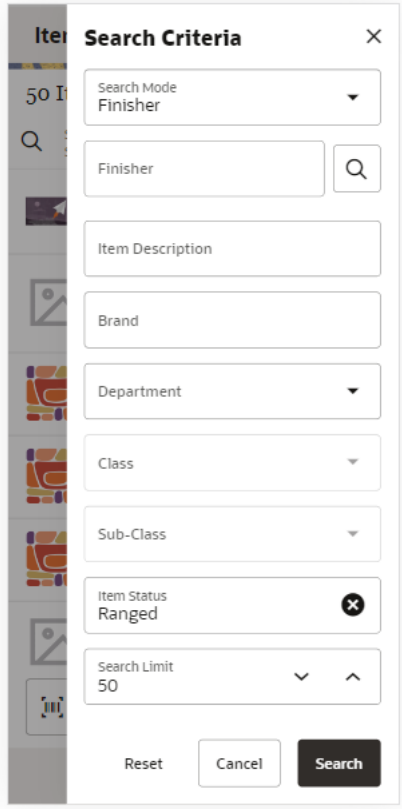
10001012 Shirt 2, blue shirt item level 2, tran level 2

10001013 Shirt 3, red shirt item level 2, tran level 2

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Searching by Finisher

Figure 4-36 Search Mode: Finisher



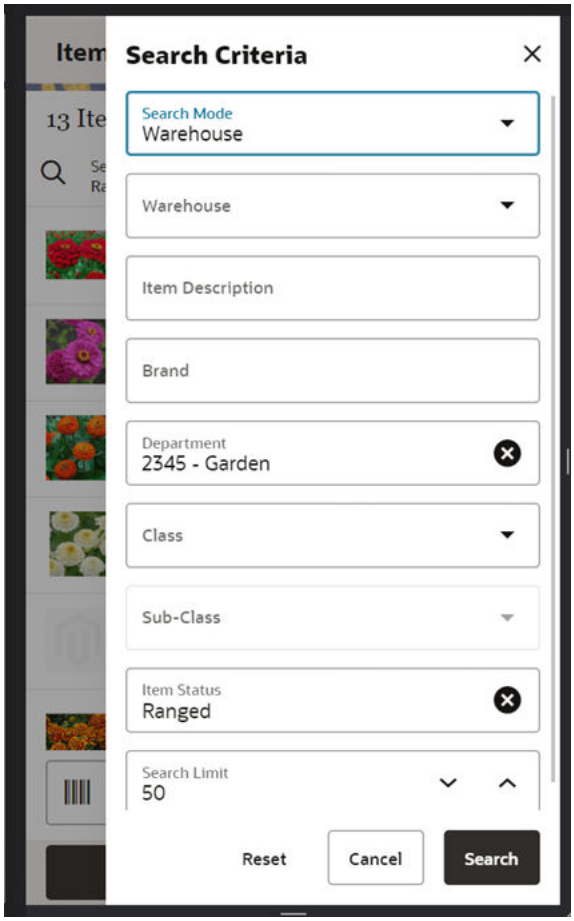
Finisher

You can search for items by Finisher by entering a Finisher number. The system returns all items belonging to the finisher. Searching by Finisher is only available if the system is configured to use Finishers.

Searching by Warehouse

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Figure 4-37 Search Mode: Warehouse



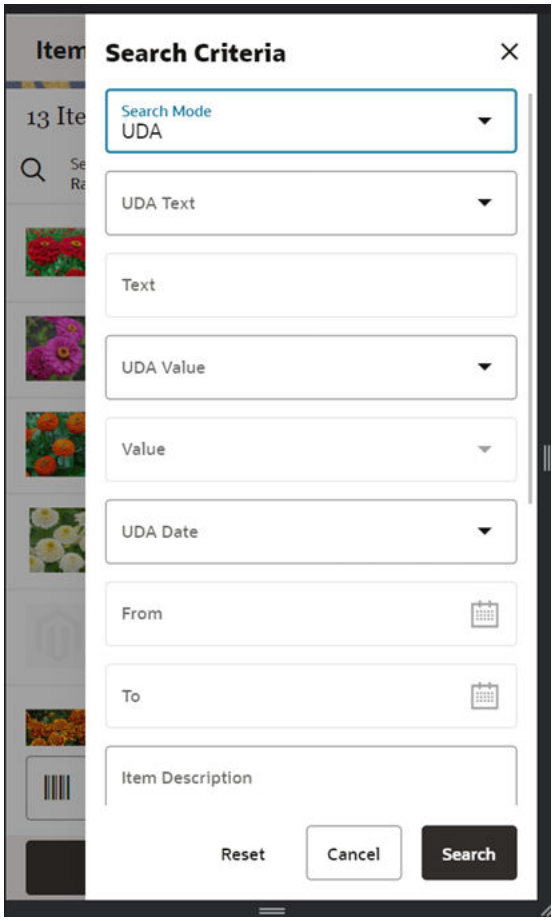
Warehouse

This field is a drop-down listing all of the warehouses by number and name in numerical order. You can select a specific warehouse and the system returns all items for the selected warehouse.

Searching by UDA

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Figure 4-38 Search Mode: UDA



UDA

This field allows you to pick a specific User Defined Attribute (UDA) and enter the corresponding search criteria. For an item to be returned, it must match all criteria entered.

Text

This field allows you to enter any part of the UDA text. Wild card searches are also allowed.

Value

This field allows you to select from a list of pre-defined values for the UDA.

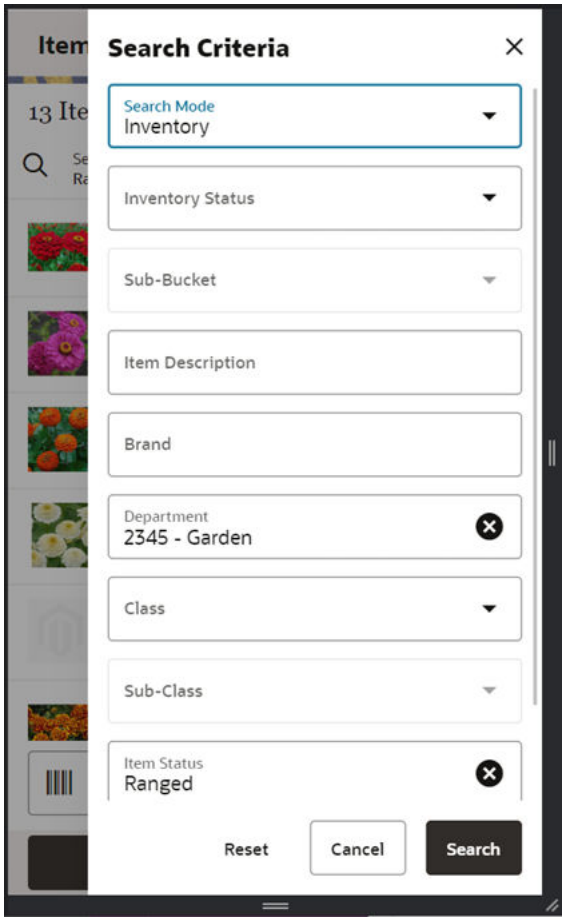
Date Range

This field allows you to enter a range of dates. Any item falling within that range is returned, providing any other criteria also matches.

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Searching by Inventory Status

Figure 4-39 Search Mode: Inventory Status



Inventory Status

This field allows you to search by available or unavailable inventory status. The system returns all items that match the status selected by you. If Available is selected, the system returns the items that have available inventory. If unavailable is selected, the system returns the items that have non-sellable unavailable inventory. This search feature gives you a way to search for items that have unavailable inventory which might need further action. It can be especially useful when looking up items when creating inventory adjustments.

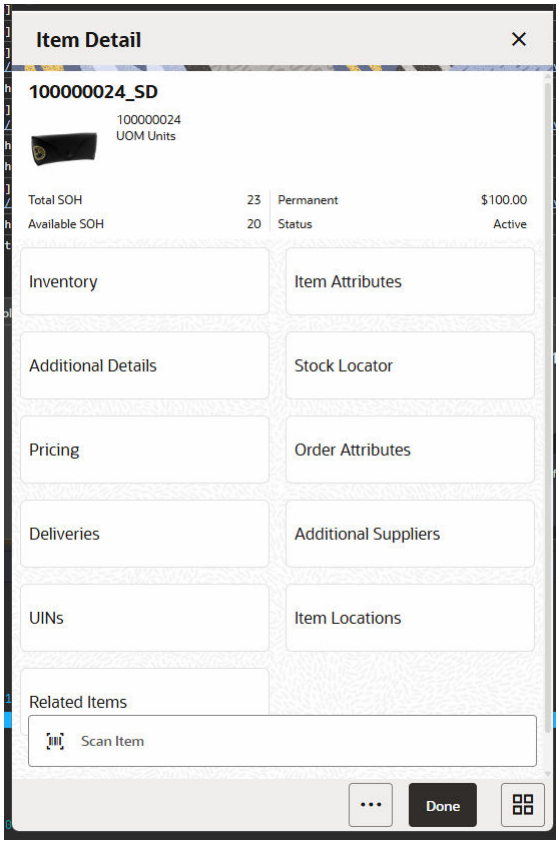
Sub-Bucket

This field allows you to continue to filter down by sub-bucket. Sub-buckets are only enabled if the system is configured to use sub-buckets. The Inventory Status must be selected as Unavailable for the Sub-bucket filter to be enabled. The system returns all items that match the selected Inventory Status and Sub-bucket.

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Item Detail

Figure 4-40 Item Detail Screen



Selecting an item on the Item Lookup screen brings you to the Item Detail screen. The header shows the item number, description, unit of measure, and item image if preferences configured to show images. Additional header information includes the total SOH, available SOH, price, price type, and status.

Upon scanning an item, the screen refreshes, and the details for the newly found item are displayed. The bottom of the screen has various features, that when selected, navigate to a screen to display the details for that feature such as inventory, pricing, item attributes, and so on.

The details include the following:

- Inventory
- Pricing
- Item Attributes - Item Attributes, Hierarchy and Diffs
- Additional Details - UDAs and CFAs
- User needs to have Access UDAs or Access Item CFAs permission in order for this menu option to be available. If neither permission, the option will not be displayed.
- Stock Locator - user must have Access Stock Locator permission

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- Pricing - must have Access Price Event permission
- Order Attributes
- Deliveries
- Suppliers
- Item Locations - Only displayed if store config 'Display Sequence Fields' is set to 'Yes'
- RFID Locations
- UINs - If the item is an UIN item

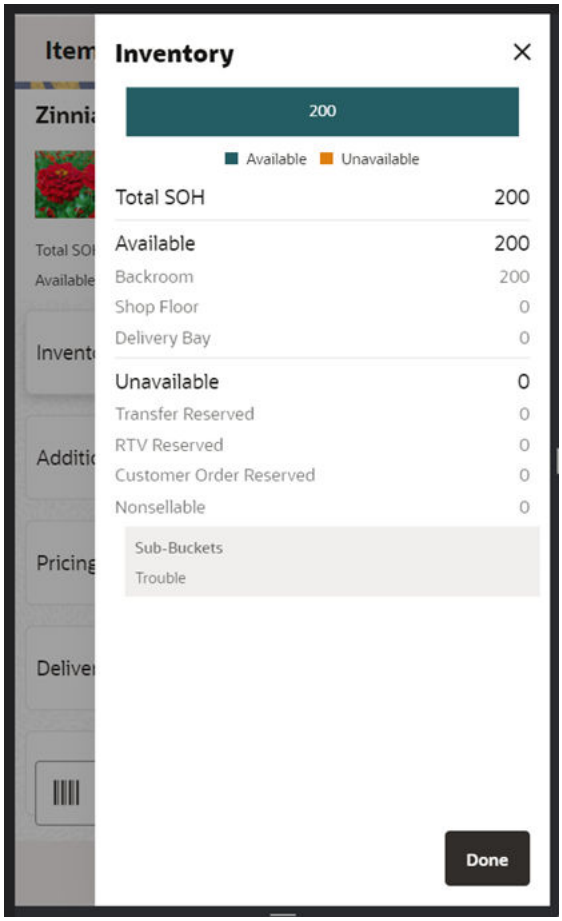
The footer menu includes options:

- Print Ticket : Selecting this option will submit the ticket printing to the external service or Bluetooth Printers depending on the printer selection. Before a ticket can be printed the user has to select a printer. See Print Ticket section
- Print Item Details: Prints out the Item report.
- Adjust Inventory: user can enter a quantity and a reason code to create an inventory adjustment. See Adjust Inventory section
- Add to Item Basket: Adds the item being looked up to an investigate type item basket. If one or more 'in progress' status 'Investigate' type item baskets exist for the user's store, the system will add the item to the newest one. If one does not exist, the system will create one. The item basket will be 'static' and available in the Item Basket dialog of both the desktop and mobile.
- Remove from Item Basket: removes from the investigate item basket

Inventory

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Figure 4-41 Inventory Screen



This is the Inventory screen which contains Stock on Hand Details for an item. It is accessed by selecting the Inventory option from the Item Detail screen within Item Lookup. This screen shows all the various stock on hand buckets including total SOH, available, shopfloor, backroom, delivery bay, unavailable, received today, transfer reserved, RTV reserved, customer order, and nonsellable.

Nonsellable represents how much stock is unavailable not associated to customer orders, RTVs or transfers. It is increased or decreased every time an inventory adjustment is made to or from unavailable inventory. It also gets updated when receiving damaged items into the store as well as returning unavailable items.

The system displays all sub-buckets that have inventory for the item at your store along with the corresponding inventory. The sub-buckets are only displayed when the system is configured for sub-buckets.

Stock on Hand Info

Total Stock on Hand = Available + Unavailable

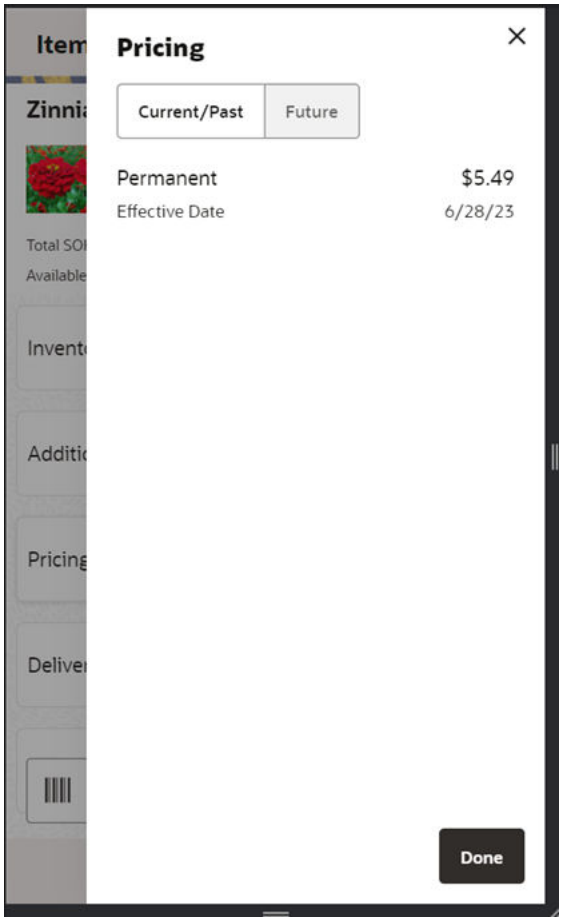
Unavailable = Transfer Reserved + RTV Reserved + Non-sellable + Customer Order

Available = Shopfloor + Backroom + Delivery Bay

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Pricing

Figure 4-42 Pricing Screen



Pricing is accessed by selecting the Pricing option on Item Detail. The Pricing screen displays the Pricing Details for the item and your store. The user will be able to select if they want to show the prices that are current, past or those that are future events. Future events can only be seen by users that have the Access Future Price Events permission.

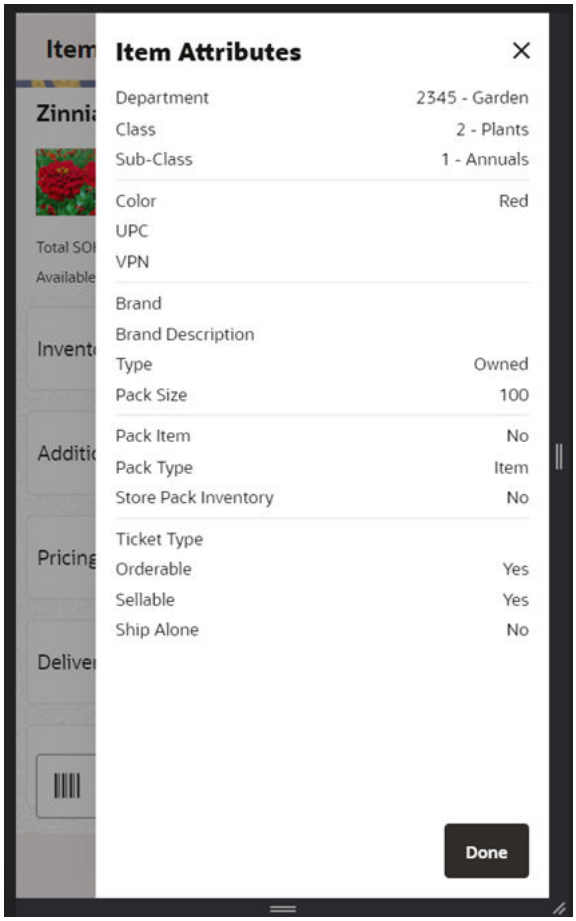
The Current / Past price change selections will show all the historic price changes for the item at the user's store that are before or equal to today, maximum of 100 records. Future Price changes will show all price events for the future, after today up to a maximum of 100 records.

Each price event is represented in as a set. The sets of price events are ordered by Effective Date/Time with most recent on the top (descending). The pricing screen will display the end date of the price event (if there is one) as well as multi unit price and multi unit quantity if they exist.

Item Attributes

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Figure 4-43 Item Attributes Screen



Item Attributes is accessed by selecting **Item Attributes** from Item Detail. It displays the Item Attributes for the item at your store.

Item Attributes

Additional information may also be helpful to view about an item. The following are some additional item attributes available on this screen:

Hierarchy: the merchandise hierarchy for the item

Diffs: The diffs for the item, up to all four diff values, if they exist

UPC: UPC for the item

VPN: Vendor product number for the primary supplier of the item

UIN Item: denotes if it is a UIN, serialized, item (store configured for UIN)

UIN Type: auto generated or serialized (store configured for UIN)

UIN Label: the label associated with the type of UIN, i.e. Serial, IMEI, License, etc. (store configured for UIN)

Brand & Brand Description: Brand of the item

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Type: owned, consignment or concession

Pack Size: This field holds the pack size (number of items in a supplier case) of this item. The pack size is populated from the item/supplier/country record for the primary supplier. For non-ranged items, this value is pulled from the master item data, for the default supplier.

Pack Item: Yes/No; indicates if the item is a pack item

Pack Type: the type of pack item: item, simple, complex, simple breakable pack, complex breakable pack

Store Pack Inventory: Yes/No; indicates tells the system when an item will only be sold and tracked as a pack

Ticket Type: Merchandising suggested ticket type code/format

Non-inventory: Yes/No; indicates if the item is flagged as non-inventory.

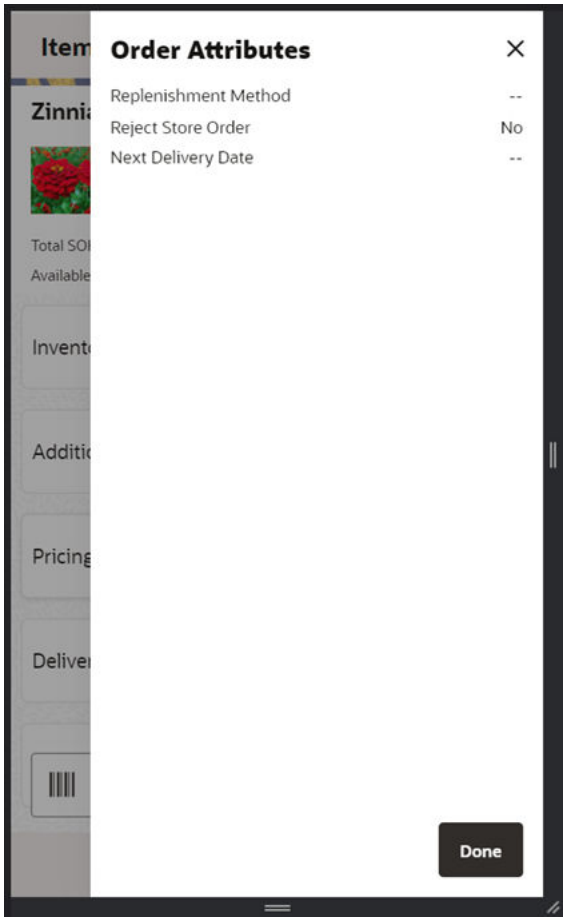
Orderable: Yes/No; indicates if the item can be ordered

Sellable: Yes/No; indicates if the item is sellable

Ship Alone: Yes/No; tells the system if an item needs to be shipped alone in customer order deliveries or not.

Order Attributes

Figure 4-44 Order Attributes Screen

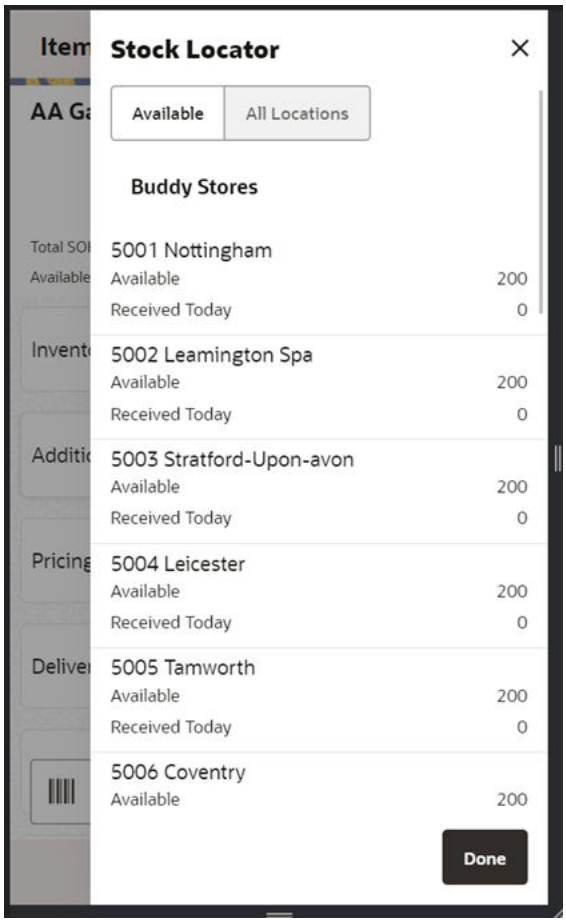


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Order Attributes is accessed by selecting **Order Attributes** from Item Detail. It displays the Ordering Attributes of Replenishment Method, Reject Store Order, and Next Delivery Date (if they exist) for the item at your store.

Stock Locator

Figure 4-45 Stock Locator Screen



The Stock Locator screen is accessed by selecting **Stock Locator** from Item Detail. This screen shows available inventory for the item at other locations, which could be stores and warehouses. The user can filter the list to show only those locations that have available inventory or to show all locations. Locations are grouped together under Buddy, Store, or Warehouse. The locations with the greatest available inventory will be listed first in the grouping.

The display of a store on this screen depends on three possible functionalities:

1. A store needs to be SIOCS Managed.
2. If transfer zones are used, only the stores within the transfer zone should appear. If no transfer zone is associated, the store is available for all transfer zones.
3. The stores listed must have the logged in store present in its shipping network to be listed on this screen.

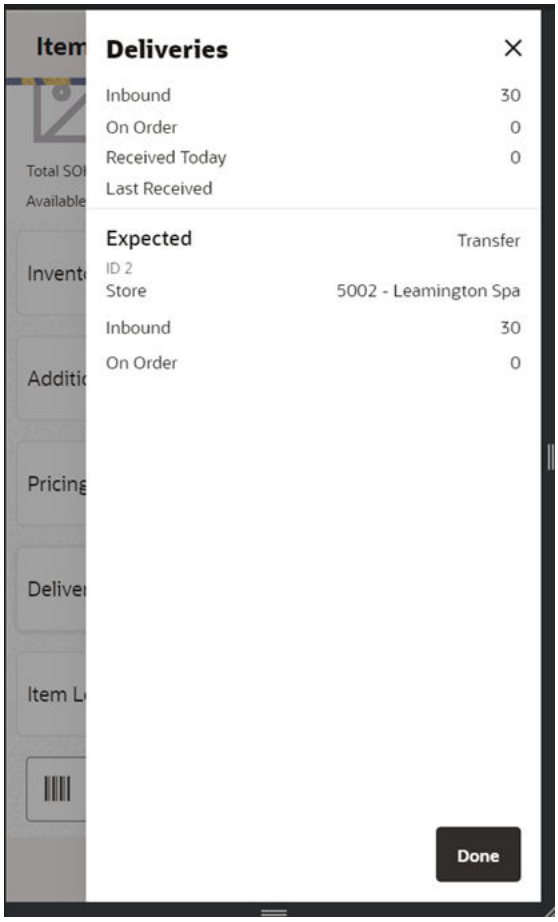
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Stores and buddy stores will have available SOH and received today displayed. Buddy stores will display the approximate distance in miles/kilometers (per localization) for the buddy store in relation to the user's store. Warehouses will only display the available stock on hand.

As far as warehouses are concerned, only the warehouses that are allowed to be received from, for the logged in store, will be listed here.

Deliveries

Figure 4-46 Deliveries Screen



The Deliveries screen is accessed by selecting **Deliveries** from Item Detail. All quantities are in the SUOM.

The header contains:

Inbound: Is the total shipped quantity from transfers, allocations, and POs on an ASN that have not been received yet.

On Order: Displays the total quantity remaining on the order. (Transfers + Purchase Orders + Allocations)

Received Today: Is the total received quantity for the current date.

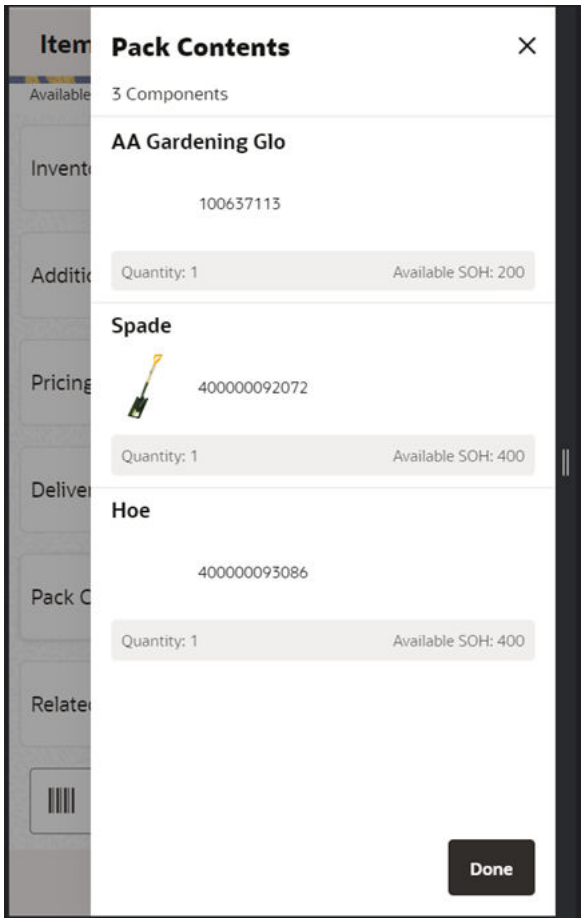
Last Received: The date when the item was last received (through a transfer delivery or a DSD/PO).

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The list portion of the screen represents the deliveries for the item. You can scroll through the list of Deliveries that are coming from a Transfer or Purchase Order. The deliveries are ordered by the Expected Date with the oldest delivery at the top (ascending). If there are no deliveries, the list will be blank.

Pack Contents

Figure 4-47 Pack Contents Screen



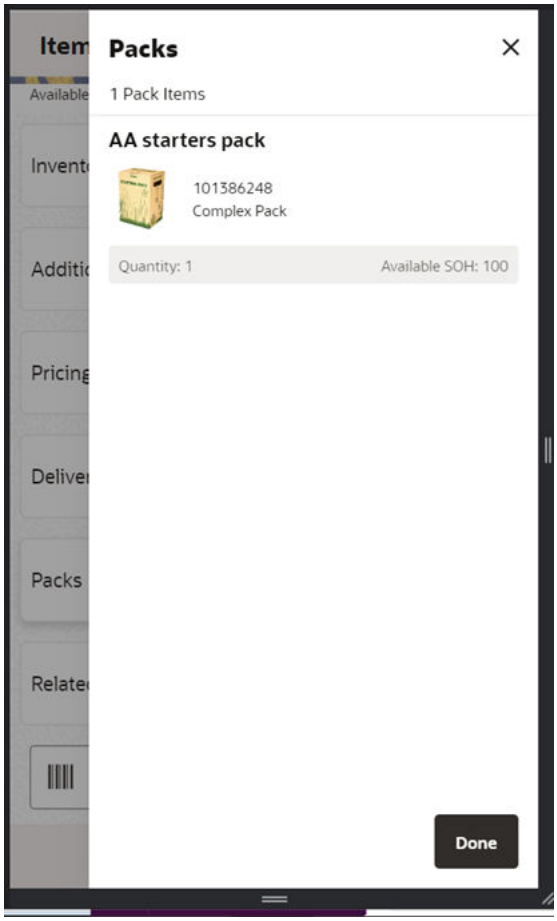
Selecting the **Pack Contents** option on Item Detail displays the components that exist for the item (pack item) being looked up. The Pack Contents option is only available for those items which are a Pack item. All quantities are in the SUOM.

Tapping a component item navigates you to the item detail for that item. You remain in that item and do not return to the original item.

Packs

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Figure 4-48 Pack Screen



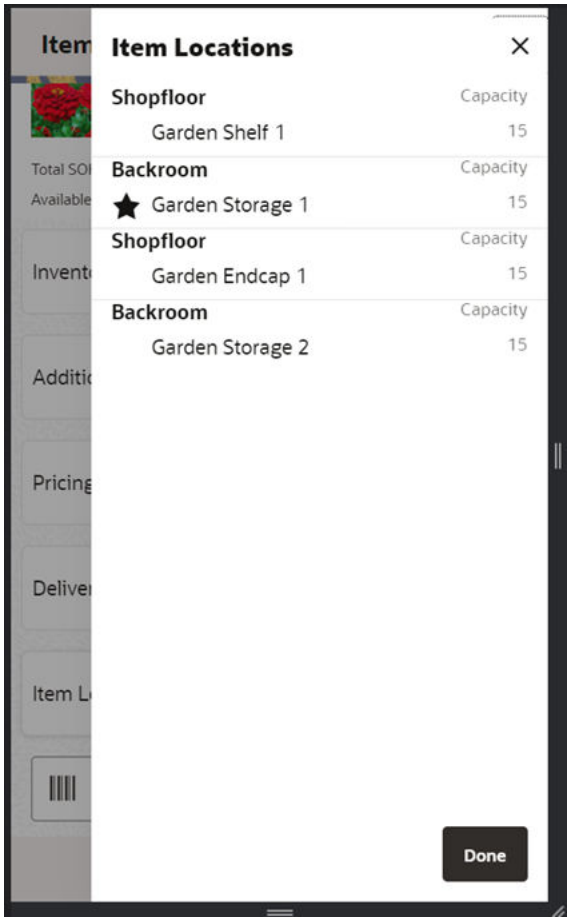
Selecting the **Packs** option on Item Detail displays the packs that exist for the item on the Packs screen. The type of pack, available stock, and the quantity of the item in the pack will be displayed. All quantities are in the SUOM.

Tapping a pack item navigates you to the item detail for that item. You remain in that item and do not return to the original item.

Item Locations

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Figure 4-49 Item Locations Screen



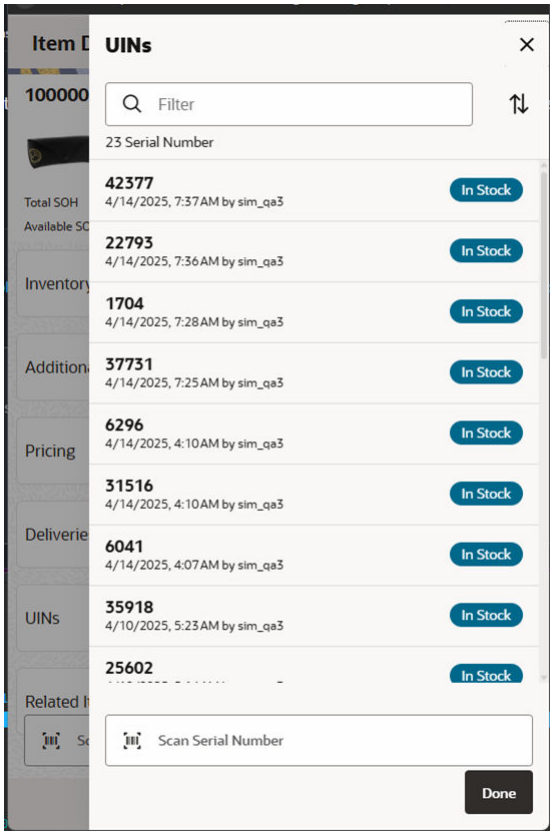
Selecting the **Item Locations** option on Item Detail displays the sequenced locations that exist for the item on the Item Locations screen. The **Item Locations** menu option is only displayed when the system is configured for Display Sequence Fields = Yes. If the system is configured to display sequence fields but there are no locations defined for the item, the screen is blank.

The macro locations will be ordered in macro sequence order and grouped under the area of Backroom or Shop Floor. The item's primary location will have a star next to it. Each locations capacity will be displayed.

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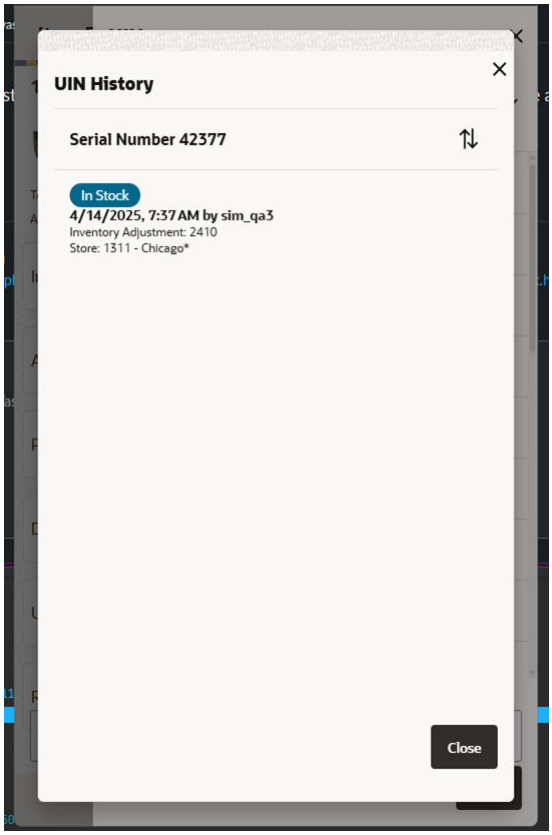
UINs

Figure 4-50 UINs Screen



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Figure 4-51 UIN History Screen



Selecting the UINs option on the Item Detail Screen displays the UINs that are in open status for that item.

You can see the list of UINs along with the status and the last update date.

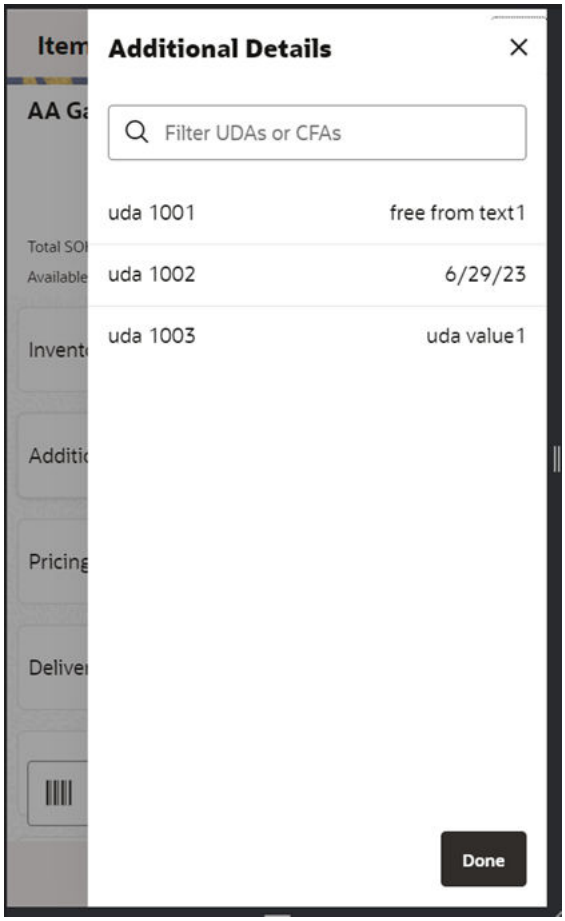
On this screen you can filter the records and sort. On the scan bar you can scan the UIN that will take you to the history if it is a valid UIN.

Upon selecting a UIN, you can view the history of the UIN. On the history screen you will be able to view the transaction history of that UIN. You can sort the records using the sort option on this screen.

Additional Details

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Figure 4-52 Additional Details Screen



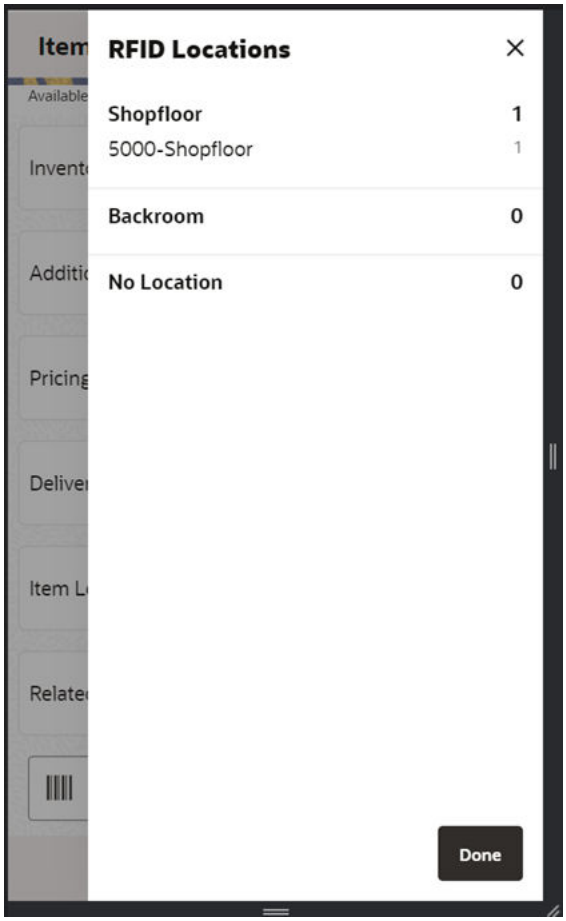
Selecting the **Additional Details** menu option displays the Additional Details for the item at your store. UDAs (User Defined Attributes) will be displayed if the user has Access UDAs permission. CFAs (Custom Flexible Attributes) will also be displayed if the user has Access Item CFAs permission.

The list is sorted in ascending order. If there are no records, the details are blank.

RFID Locations

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Figure 4-53 RFID Locations Screen



Selecting **RFID Locations** from Item Detail displays the RFID location inventory. This menu is available only if the item is RFID tag enabled item.

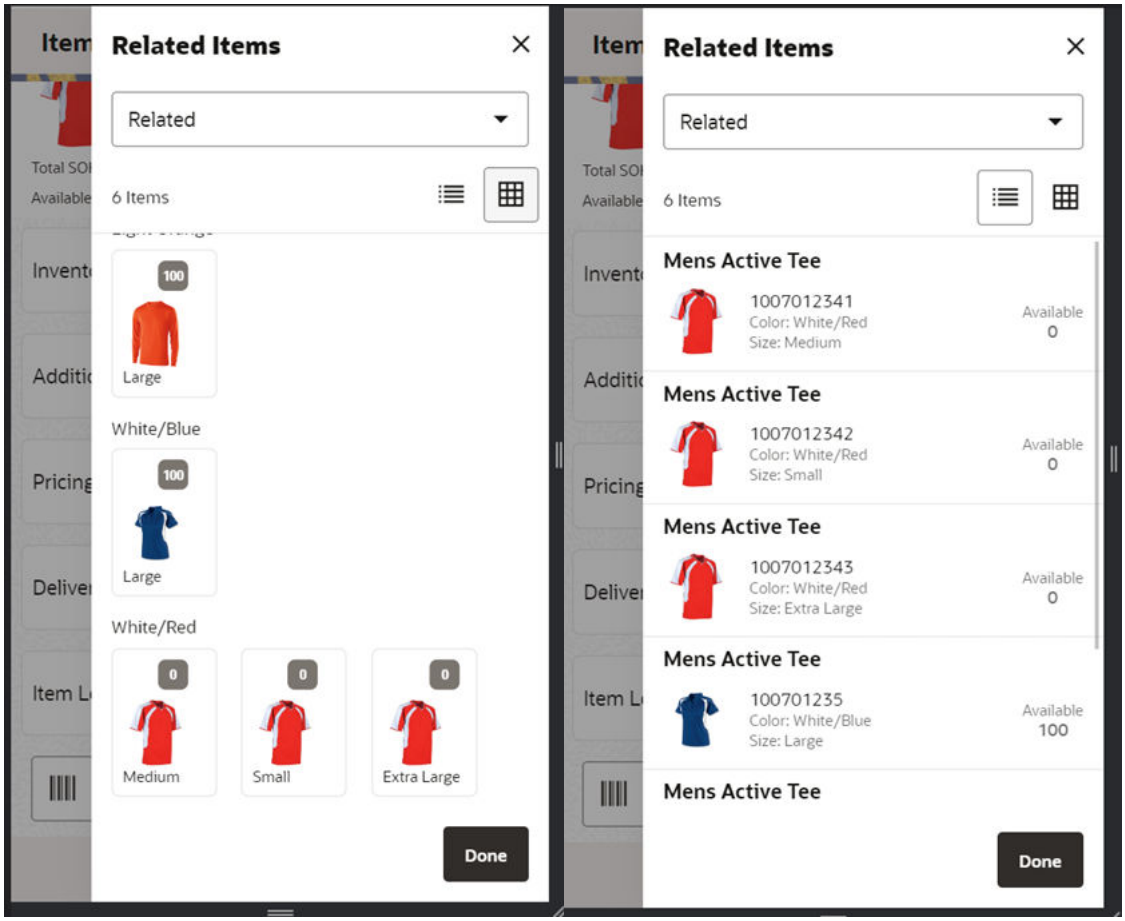
RFID locations are defined in the RFID solution and uploaded into system.

RFID locations with their stock on hand. The inventory positions shown here are the accumulated numbers of the tags present in the location and represented in standard unit of measure.

Related Items

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Figure 4-54 Related Items Screen



The **Related Items** screen is accessed by selecting the Related Items menu option on the Item Detail screen. The Related Items screen displays the related items for the item at your store. The available inventory will be shown in the SUOM. The related item types of cross sale, up sale, substitute, and related (style) are listed. There is a type filter at the top of the screen allowing you to filter by the type of related item. All items display, even if they are not ranged to the store.

Only Active related items are listed, where today's date is within the effective date and end date for the related item. If there is no effective date, the item is assumed to be active.

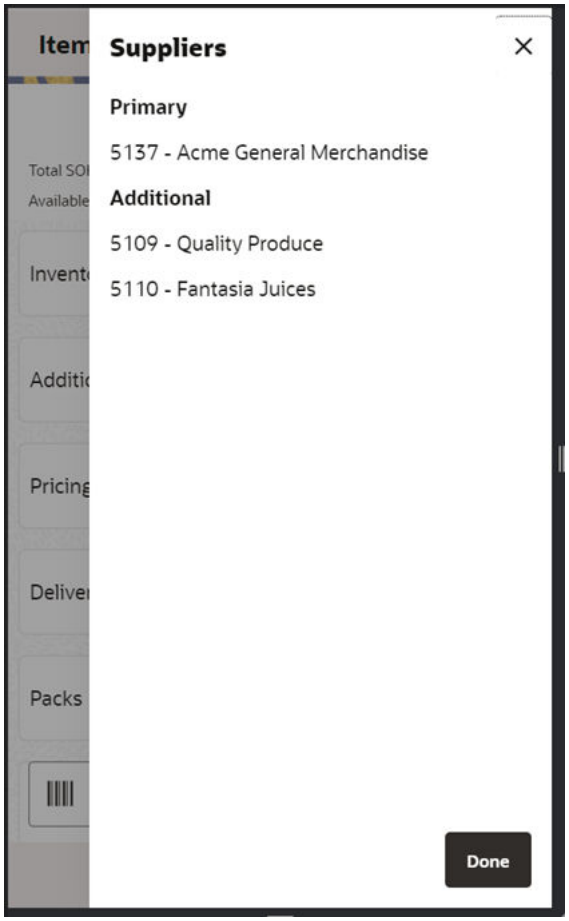
There will be two different views available. If the item is a Related Item type without diffs associated to it, then only a list view. If it is a Related Item type with diffs then there will be two views available: item list and tile view. The list view will be a scrollable list in item ID ascending order. The tile view will look at a system parameter, Related Items Group by for Item Lookup to determine which diff (1, 2, 3, or 4) to group by. If the item does not have the diff that is defined by the system parameter, the item will not be displayed.

If you select a related item record in the list, you navigate to the Item Detail screen for that item. You are in the details for that item. There is not a way to navigate back to the original item. If there are no related items, the details are blank.

Suppliers

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Figure 4-55 Suppliers Screen

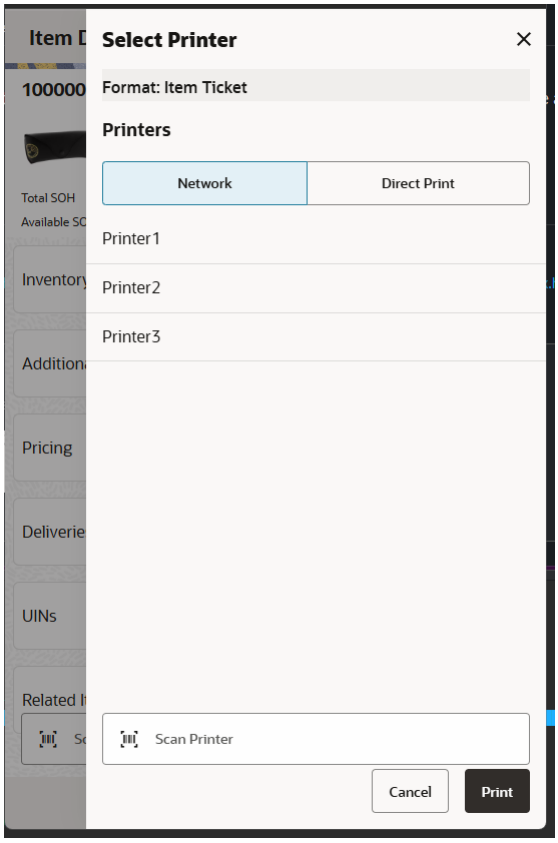


Selecting the **Additional Suppliers** option on Item Detail displays the Suppliers screen. This screen lists the additional suppliers that exist for the item. The primary supplier is not displayed. If there are no additional suppliers, this screen is blank. User can select a supplier and navigate to the details of that supplier.

Print Ticket

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Figure 4-56 Select Printer Screen



The Select Printer screen displays a list of printers including Bluetooth printers.

On this screen, you can filter the printers by Network or Direct Print.

Network printers are printers that are configured in the store.

Direct Print printers are printers like Blue Tooth printers that are configured in the device.

On this screen you can select or scan the barcode of the printer and submit the tickets for printing.

This ticket print will always be the item default ticket format.

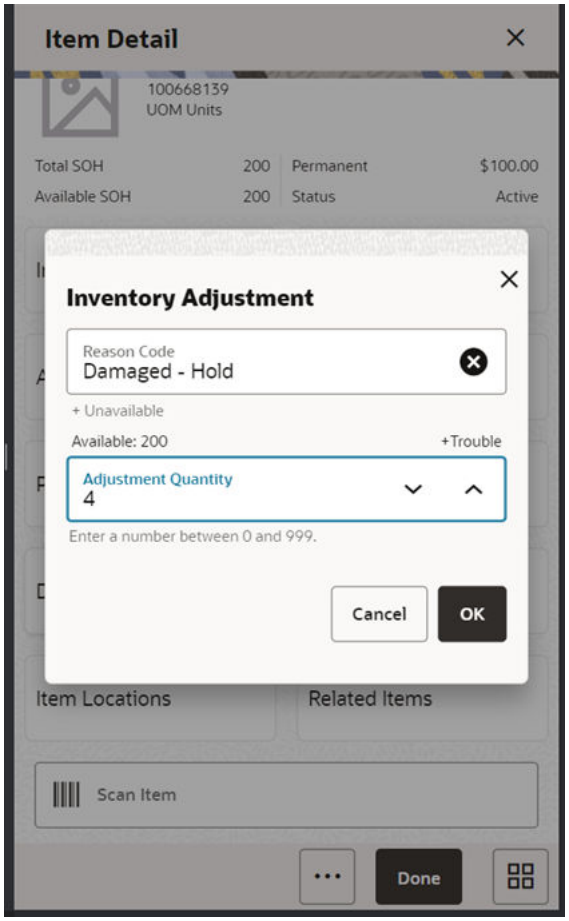
For Bluetooth printing, the ticket must have a ZPL attached.

The system will print the tickets for the current event that is effective for the item.

Adjust Inventory

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Figure 4-57 Adjust Inventory Screen



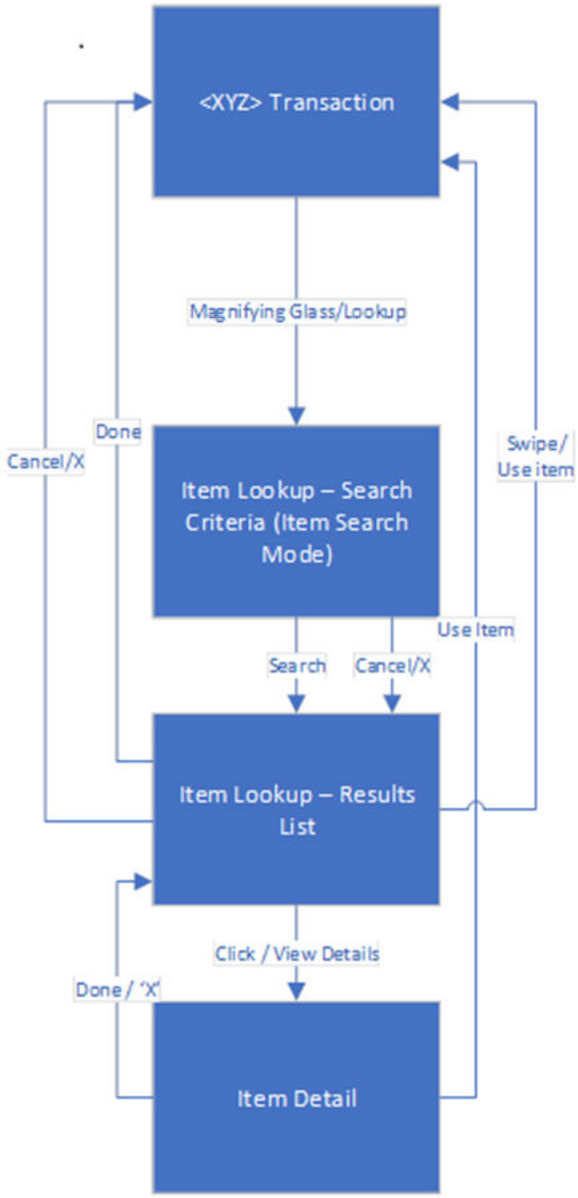
The Adjust Inventory screen is displayed when selecting **Adjust Inventory** from the footer menu of Item Lookup. The user will select a reason code and enter in the quantity to adjust. The system will create an approved inventory adjustment transaction to update inventory based upon the disposition associated to the selected reason code. A Transaction History record is written for all reason codes except for those that touch the customer order reserved buckets. The inventory adjustment is published based upon the publish indicator associated to the reason code. Only those reason codes the user has security permissions for will be available for selection.

Universal Item Lookup JET Mobile

Universal Item Lookup is the Item Lookup dialog that is accessed from within another transaction or other area of the application. For example, when creating an inventory adjustment, if the barcode is not available and the item is not known, the user can lookup the item within the universal item lookup dialog and then navigate back to Inventory Adjustments.

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Figure 4-58 Universal Item Lookup Screen Flow



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Access Universal Item Lookup via the magnifying glass in most places you can enter or scan an item. You will be directed to the Item Lookup Search Criteria screen. After entering search criteria, the list of items will be returned. From here an item can be selected from the list by swiping left and applied to the original item field from where the universal item lookup was executed. Or you can then choose to view the details of a specific item in Item Detail and apply from there. Note: See Item Lookup screens under Item Lookup JET Mobile.

Figure 4-59 Inventory Adjustments



The item lookup dialog will be accessed via other areas within the application when an item can be scanned or typed in. Use the magnifying glass to navigate into the Item Lookup Search Criteria screen. Search for an item and once applied you will exit out of Item Lookup and return to the dialog in which you started with the selected item applied.

Supplier Lookup MAF Mobile

The Supplier Lookup functionality provides you with the ability to view information about the supplier. The following information is available, but is not limited to this list:

- ID
- Name
- HQ Address, Phone, Contact, Contact Email
- Return Address, Phone, Fax, Contact Email
- Status

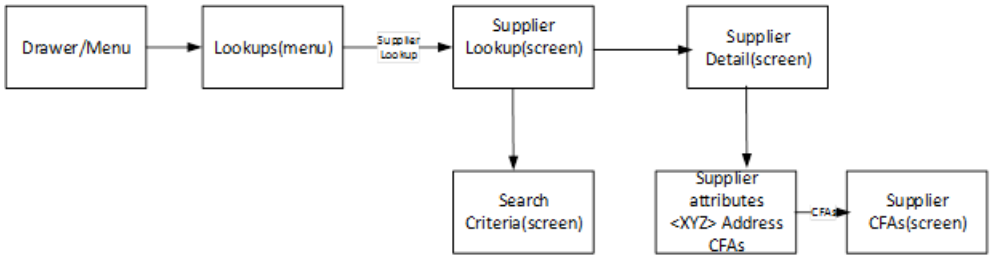
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- Return Allowed
- Return Authorization Required
- CFAs (Custom Flexible Attributes)

This dialog may be used in conjunction with other dialogs (Return to Vendor, Store Orders to a Vendor, Direct Store Delivery) to look up suppliers and assign the supplier to the transaction.

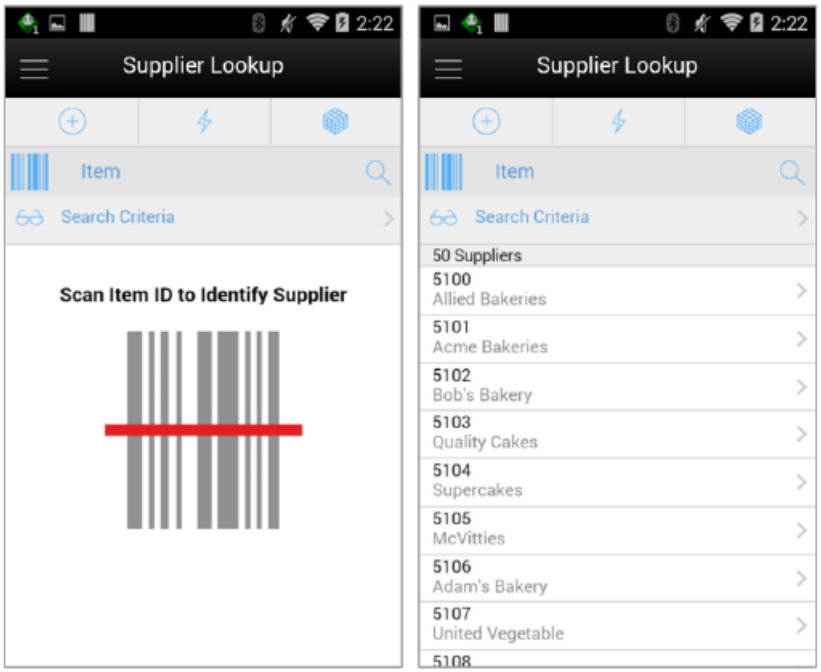
> **Note**
>
> A supplier in SIOCS is defined as a supplier site in the merchandising system.

Figure 4-60 Supplier Lookup Screen Flow



This is the screen flow for the Supplier Lookup functionality. Select **Supplier Lookup** from within the Lookups menu. Navigate to Supplier Lookup that lists the suppliers. Initially this screen will be empty with no suppliers listed. Search for suppliers by tapping the eye glasses (search criteria) and navigate to the search criteria screen. Once a supplier is selected from the list, go to the Supplier Detail for that supplier and the header level supplier info will be displayed. You can view the details of the various addresses by selecting an address option.

Figure 4-61 Supplier Lookup Screen



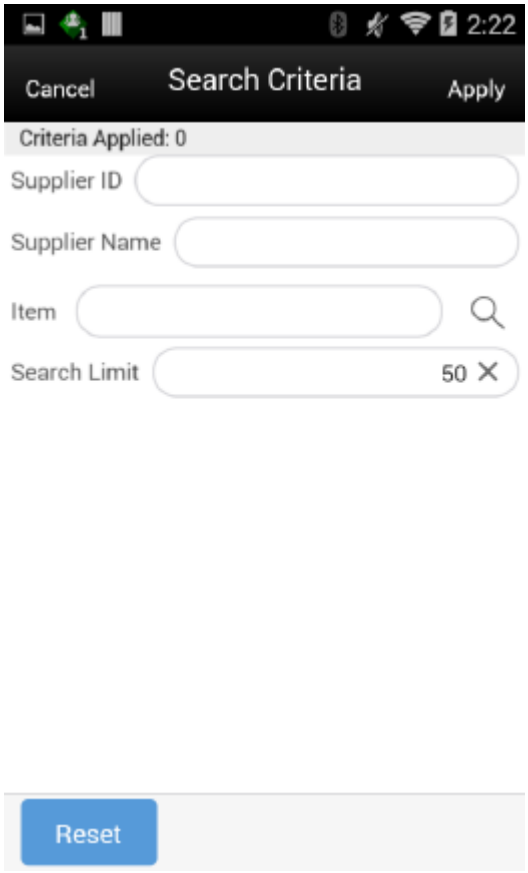
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When navigating to Supplier Lookup, you are taken to a blank list screen without any supplier results being displayed. The scan type is the only header function that is used in Supplier Lookup, which is used to determine what type of item is scanned when entering or scanning an item to identify the supplier.

Use the search criteria, eye glasses, to navigate to the Supplier Search Criteria screen to enter criteria search for suppliers. Search criteria include supplier ID, supplier name, and item. After applying the search criteria, the results are listed on the supplier lookup screen together with the applied criteria. Selecting a supplier from the results list navigates to the Supplier Detail screen for that supplier.

When scanning/entering an item in the scan bar, the system adds the scanned item to the entered search criteria and narrows down the list of suppliers by the item that was scanned. If it results in a single item, the system finds the supplier(s) based upon that item and presents them in the list. If there is more than one item found based upon the scan it provides an item selection to select the proper item. The item is applied to the search criteria and the supplier results are returned.

Figure 4-62 Supplier Search Criteria Screen

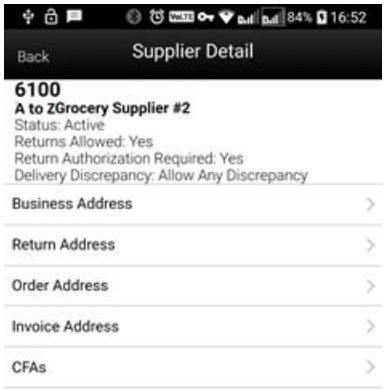


The Supplier Search Criteria screen is accessed through the eye glasses search criteria function on Supplier Lookup. You can enter various search criteria to find a supplier. The results are listed on the Supplier Lookup screen.

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Supplier Detail

Figure 4-63 Supplier Detail



From Supplier Lookup, selecting a supplier displays the Supplier Detail screen. This is a read-only screen to display the details of the supplier being looked up.

The header shows the supplier ID, supplier name, status of the supplier, whether returns are allowed, if a return authorization number is required, and if supplier deliveries allow for discrepancies. In the bottom of the screen there are options for various address types for the supplier. The types may be different per supplier, and types may be duplicated per supplier. The types are based upon the types in the system which came from the merchandising system. Selecting a type will navigate to the details of that address. Address fields include address, phone, fax, contact name, and email if they exist for the supplier. The CFAs of the supplier can be viewed by selecting the CFAs option.

Supplier CFAs

Figure 4-64 Supplier CFAs



Selecting **CFA** from the Supplier Detail screen displays the CFA information for the supplier. The CFAs are setup at merchandising system and the Enterprise Inventory system subscribe to this information. Each CFA and value are represented in a set. If there are no CFAs available, a message that no CFAs are available is displayed in the screen. The list is ordered by CFA.

Supplier Lookup JET Mobile

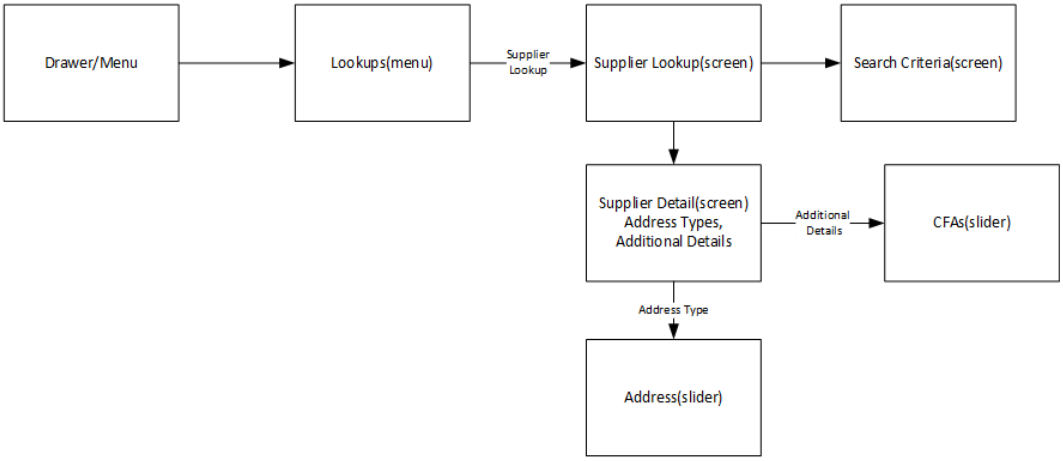
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The Supplier Lookup functionality in JET mobile provides you with the ability to view information about the supplier. The following information is available, but is not limited to this list:

- ID, Name and Status of the supplier
- Various Addresses and Contact details of the supplier such as Business Address, Return Address, Order Address, Invoice Address etc.
- Return Allowed or not
- Return Authorization Required or not
- Additional Details such as CFAs (Custom Flexible Attributes) for the supplier

Figure 4-65 Supplier Lookup Screen Flow

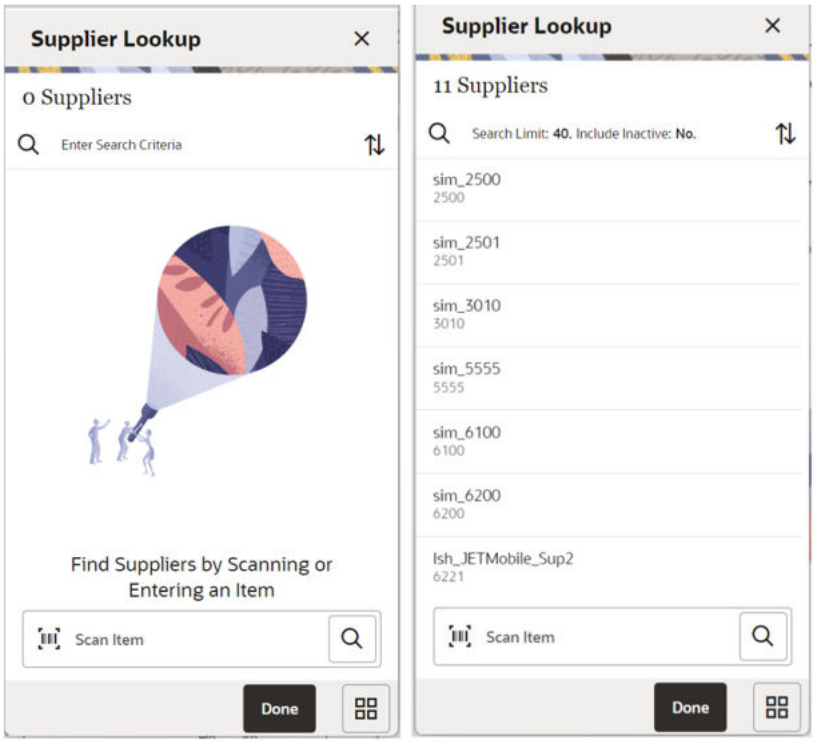
> **Note**
>
> A supplier in SIOCS is defined as a supplier site in the merchandising system.



This is the screen flow for the Supplier Lookup functionality. Select Supplier Lookup from within the Lookups menu. Navigate to Supplier Lookup that lists the suppliers. Initially this screen will be empty with no suppliers listed. Search for suppliers by tapping the magnifying glass (search criteria) and navigate to the search criteria screen where you enter the search criteria. The search result is displayed on the Supplier Lookup screen. Once a supplier is selected from the list(search result), go to the Supplier Detail for that supplier and the header level supplier info will be displayed. You can also view the details of the various addresses and additional details about the supplier in the screen.

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Figure 4-66 Supplier Lookup Screen



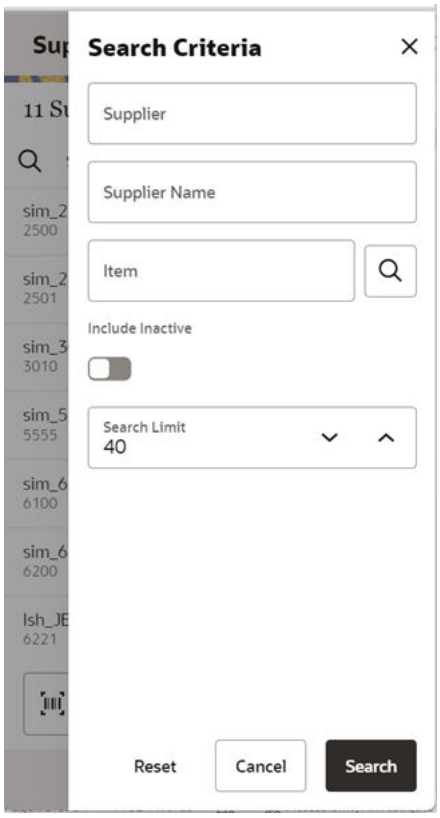
When navigating to Supplier Lookup, you are taken to a blank list screen without any supplier results being displayed. The user can use the scan bar to scan an Item ID, UIN, VPN, GS1 barcode etc., to fetch the supplier associated with it. The scan result is displayed in this screen.

When scanning/entering an item in the scan bar, the system adds the scanned item to the entered search criteria and narrows down the list of suppliers by the item that was scanned. If it results in a single item, the system finds the supplier(s) based upon that item and presents them in the list. If there is more than one item found based upon the scan it provides an item selection to select the proper item. The item is applied to the search criteria and the supplier results are returned.

User can also use the search criteria, magnifying glass, to navigate to the Search Criteria screen to enter search criteria to search for suppliers. After applying the search criteria, the results are listed on the supplier lookup screen together with the applied criteria. By clicking on the Sort icon in the screen, the user can sort the search result based on Supplier ID, and Supplier Name. Selecting a supplier from the search results navigates to the Supplier Detail screen for that supplier.

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Figure 4-67 Search Criteria Screen



The Search Criteria screen is accessed by clicking on the magnifying glass or the search bar on the Supplier Lookup screen. Search criteria include Supplier ID, Supplier Name, and Item. User can exclude inactive suppliers from the search if needed. You can enter one or more search criteria to find a supplier. The results are listed on the Supplier Lookup screen.

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Figure 4-68 Supplier Detail

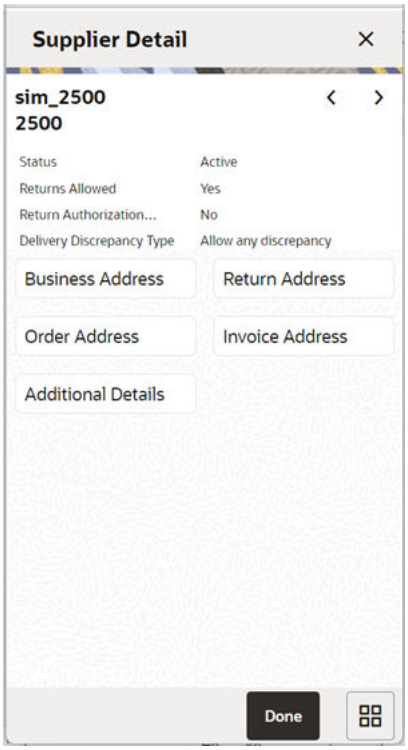
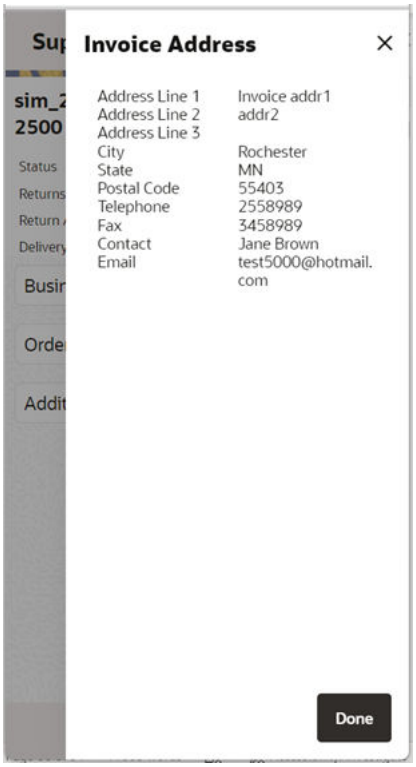
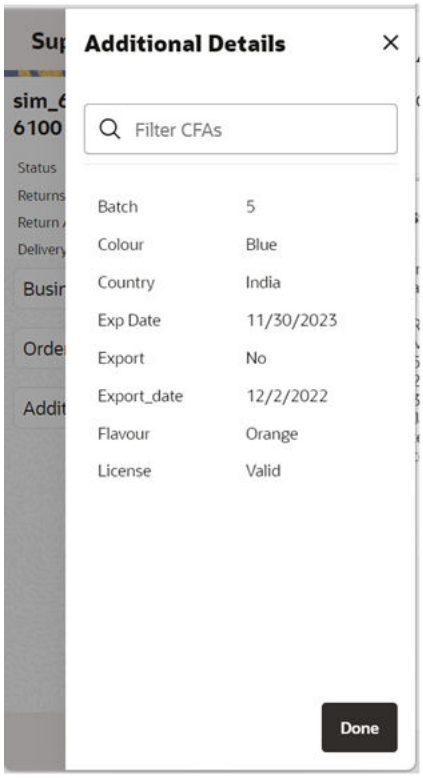


Figure 4-69 Address Type



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Figure 4-70 Additional Details



From Supplier Lookup, selecting a supplier displays the Supplier Detail screen. This is a read-only screen to display the details of the supplier being looked up.

The header shows the supplier ID, supplier name, status of the supplier, whether returns are allowed, if a return authorization number is required, and if supplier deliveries allow for discrepancies. In the bottom of the screen are options for various address types for the supplier. The types may be different per supplier, and types may be duplicated per supplier. The types are based upon the types in the system which came from the merchandising system. Clicking a type will show the details of that address. Address fields include address, phone, fax, contact name, and email if they exist for the supplier. The CFAs of the supplier can be viewed by selecting the Additional Details option. 'Access Supplier CFAs' security permission is needed for this option to display in the screen. The CFAs are setup at merchandising system and the Enterprise Inventory system subscribe to this information. Each CFA and value are represented in a set. If there are no CFAs available, a message that no items are available is displayed in the screen. The list is ordered by CFA.

If the scan/search returned multiple suppliers, user can view the Supplier Detail of other suppliers using the front and back arrows on the screen.

Container Lookup

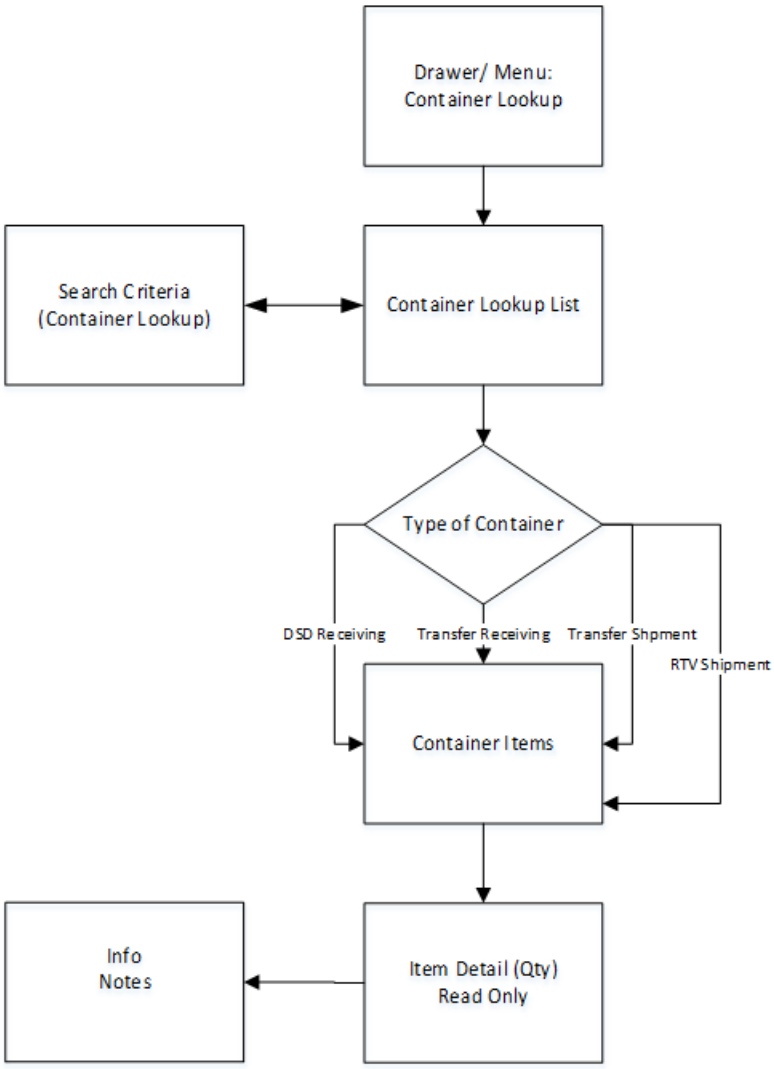
The Container Lookup functionality provides you with the ability to view information about a warehouse/finisher delivery container. The following information is available, but is not limited to this list:

- Container ID
- ASN Number

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- Status (Received, In Transit, and so on)
- Receipt Date and Time
- From Location
- Number of Cases
- Damages

Figure 4-71 Container Lookup Screen Flow



Container Lookup is accessed from the Container Lookup menu option within Lookups in the drawer menu. Enter the details, and you see the details for the container based upon the type of container being looked up. No changes can be made to the container or its content from this screen.

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Figure 4-72 Container Lookup Screen

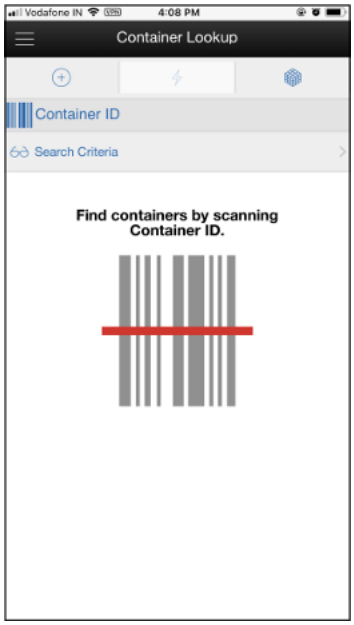
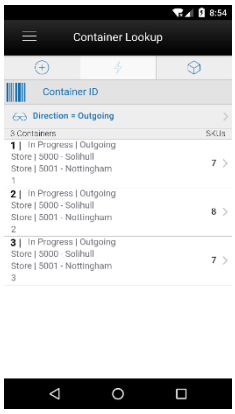


Figure 4-73 Container Lookup Details

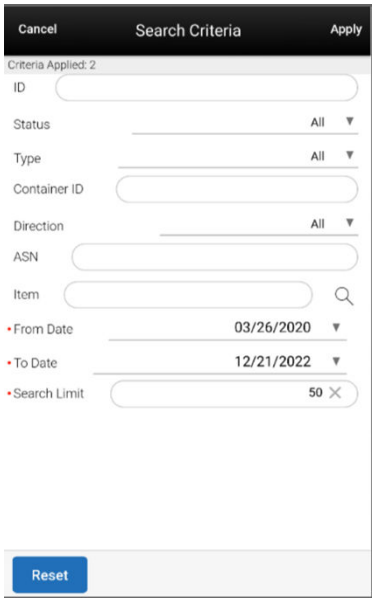


The Container Lookup screen is accessed using the Container Lookup menu option within Lookups in the drawer. The search criteria screen is accessed using the eye glasses where you can search for a container. You can also scan a container (External ID (SSCC), Internal ID, or Tracking ID) and the container will be presented in the list. You will be able to look up any container, regardless of store. Selecting the container will navigate to the details for that container. You will only be able to enter containers where the Source or Destination is for your store.

Container Lookup can be used for looking up containers for Transfers Shipping and Receiving, DSD Receiving and RTV Shipment.

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Figure 4-74 Container Search Criteria Screen

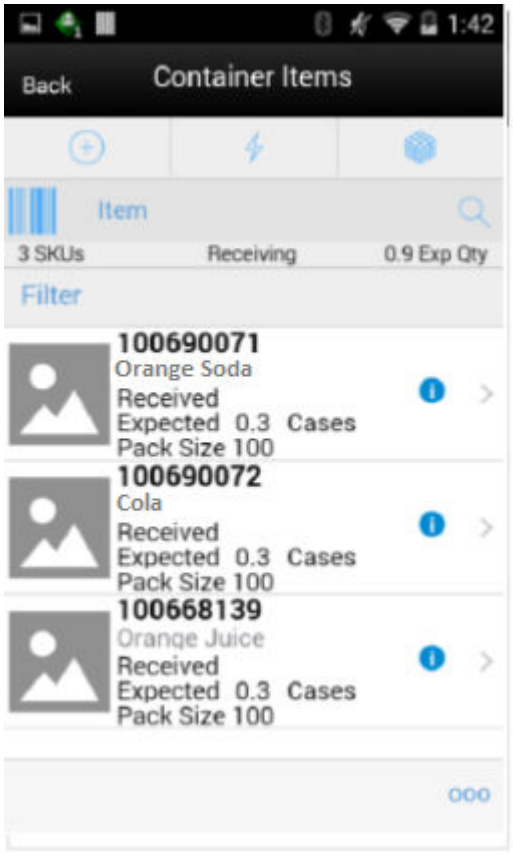


The Search Criteria screen is accessed using the eye glasses search criteria on Container Lookup. You can enter in various criteria that would help you to search for a container, such as Container ID, Item ID, ASN, Source Type, From Date/To Date (Update date of the container is used here) and the system returns the results on the Container Lookup screen. The search restricts the containers to those for your store.

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Container Items

Figure 4-75 Container Items (Transfer Receiving)



The Container Items screen is accessed after going into the details for a specific container. This screen lists the items in the container. The screen details vary depending on the type of container. For example, expected quantities for an outbound container will not be displayed.

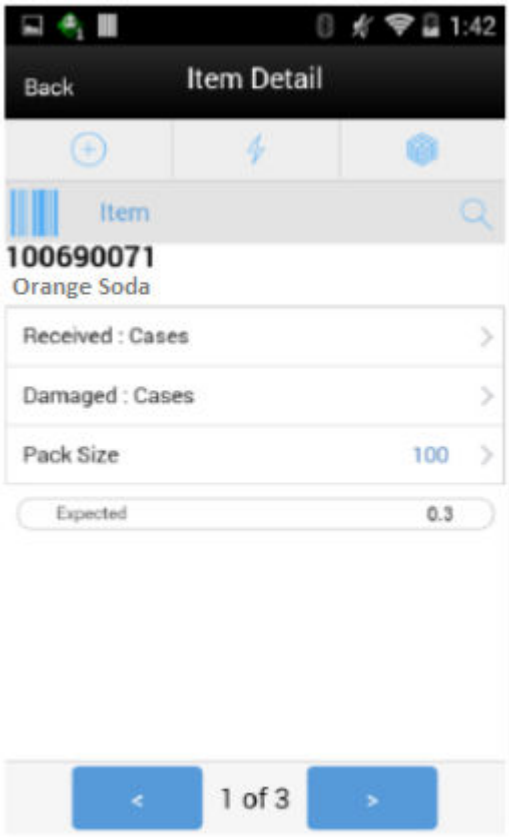
On this screen, the user can select the **Print Tickets** option from the footer menu to access the **Print Tickets** dialog. Using **Print Tickets** dialog, the user can submit the ticket printing to the external service for the selected container items.

For more details on this screen, refer to the common usage section.

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Container Lookup Item Detail

Figure 4-76 Container Lookup Item Detail Screen (Transfer Receiving)

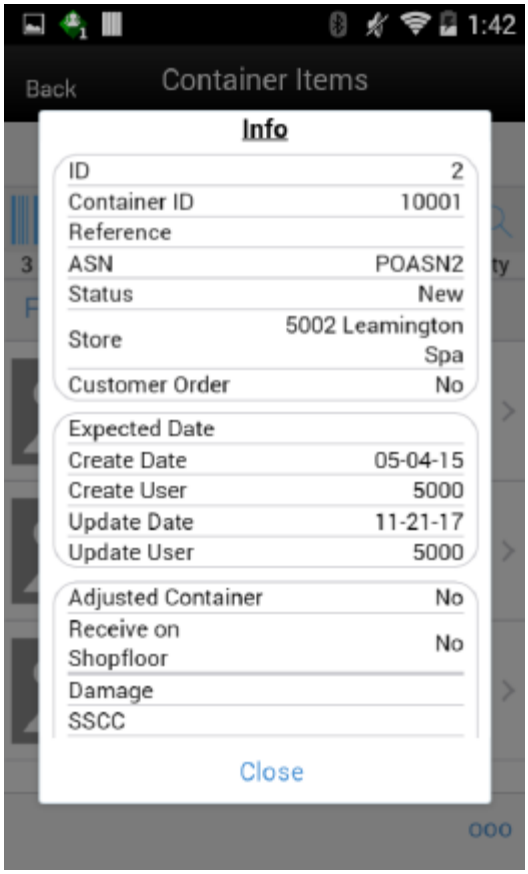


The Item Details screen is accessed after going into the item details of an item on the container. The screen varies depending on the type of container.

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Container Lookup Info

Figure 4-77 Container Lookup Info Screen (Transfer Receiving)



The Info screen is accessed after selecting the **Info** menu option from the footer menu of the Container Items screen. The screen varies depending on the type of container. The Info screen in Container Lookup is the same as that in the actual transaction, that is, Transfer Receiving. This screen is view only.

Container Lookup JET Mobile

The Container Lookup functionality provides you with the ability to inquire and view information about an incoming or outgoing container of various types of viz Store, Supplier, Warehouse and Finisher. This means, the container Lookup can be used for looking up containers for Transfers Shipping and Receiving, DSD Receiving and RTV Shipment. The system allows you to do container lookup pertaining to your store where it is source or destination.

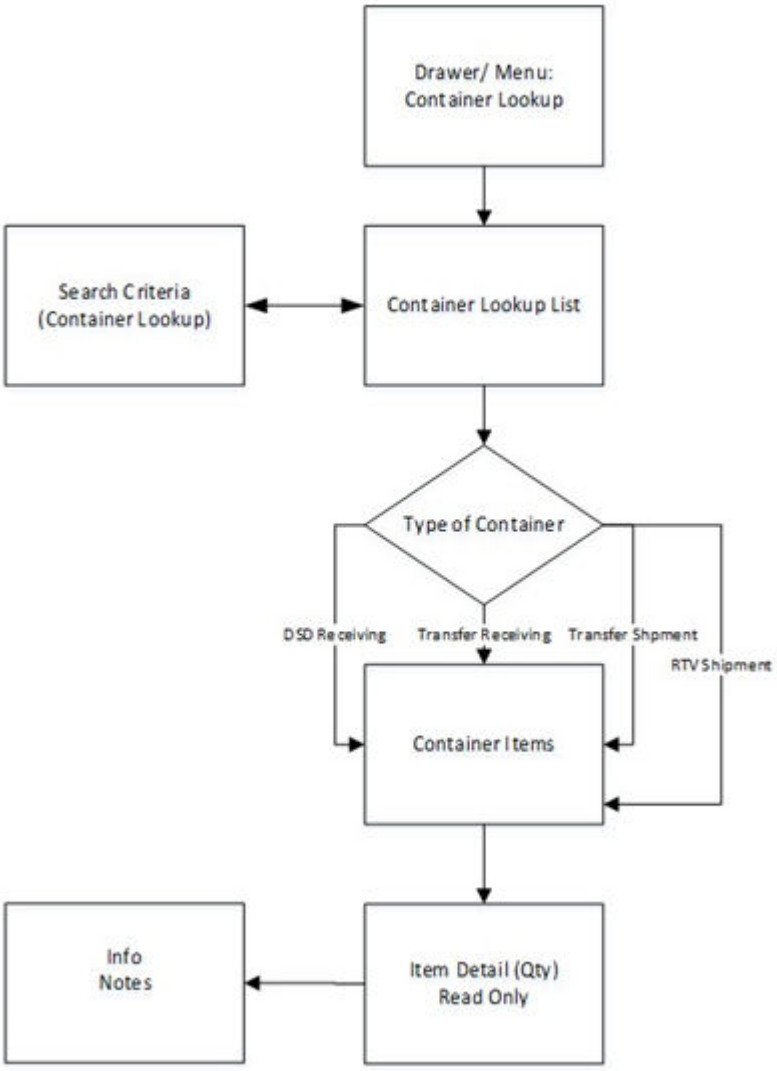
When you look up the container, the system provides all the required information of the container that is required in a read only mode. Below are some of the information on container available.

- Container ID
- ASN Number

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- Status (New, In Progress, Received, and so on)
- Receipt Date and Time
- From or To Location
- Number of Cases
- Damages

Figure 4-78 Container Lookup Screen Flow



Container Lookup dialog is accessed from the Container Lookup menu option within Lookups in the drawer menu.

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Figure 4-79 Container Lookup Screen

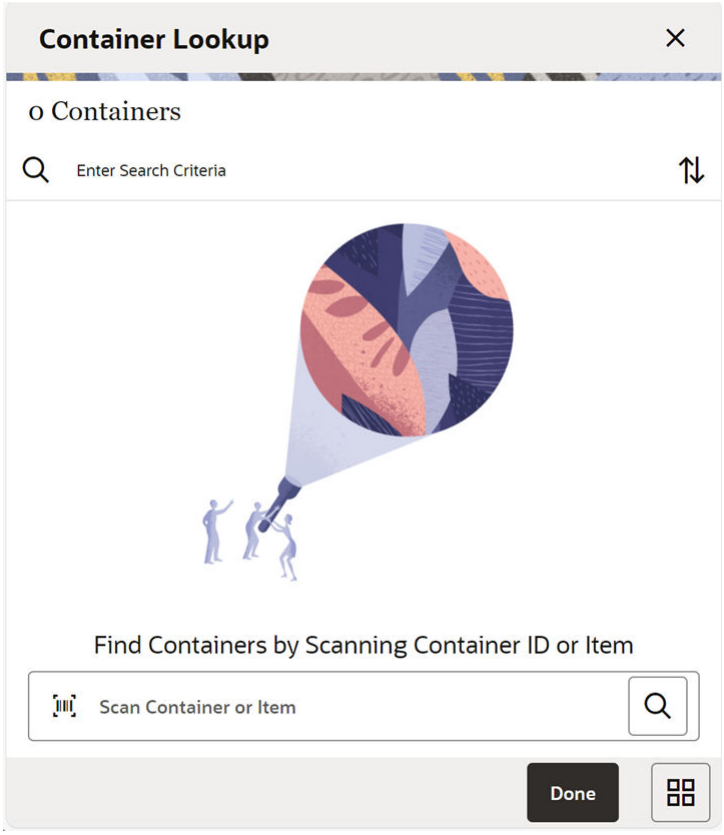
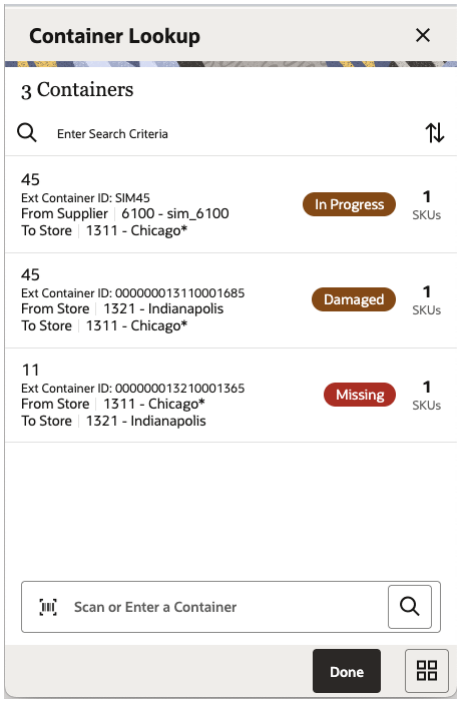


Figure 4-80 Containers List



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When you access the dialog using the Container Lookup menu, initially the system shows an empty list and allows you to scan or search the containers using the search criteria. The search criteria screen is accessed using the magnifying glass where you can search for containers by entering the search criteria. On the scan bar you can also scan an Item or Container (External ID (SSCC), Internal ID, or Tracking ID) and the system will produce the list of containers based on the item or container id scanned or entered.

When a barcode is scanned, the system will first lookup the match for the external container ID (SSCC) or internal container ID or tracking ID. If no match was found, the system will use the barcode to lookup the item and use the item to find the container.

When a barcode is scanned, the system will search and return All containers for ALL stores and allow the user to navigate to view the details on the next screen.

> **Note**
>
> Deliveries and shipment transactions that are marked as without containers are excluded in the search and not listed here.

When scanning a container, the system will always return a list of containers on the list screen. It would not navigate to the details of the container even if only one result was found. A list is needed because the list provides details to the user about the source/destination locations.

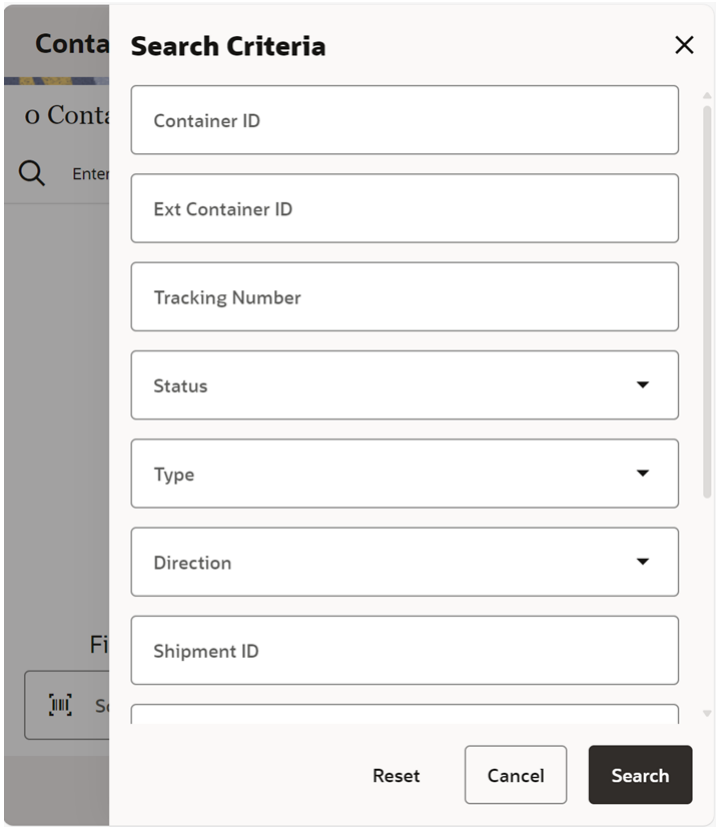
> **Note**
>
> There are chances the shipment and receipt having same IDs. In this case the system will show the results including both the containers and you can select.

On the list screen, the system displays the header level information of the container such as Container Id, External Container Id, Source or Destination details, status, and the number of SKUs in the container. You can also sort the list using the sort option.

You can navigate to the respective container items/Items screen depending on the transaction by selecting the container from the list.

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Figure 4-81 Container Search Criteria Screen

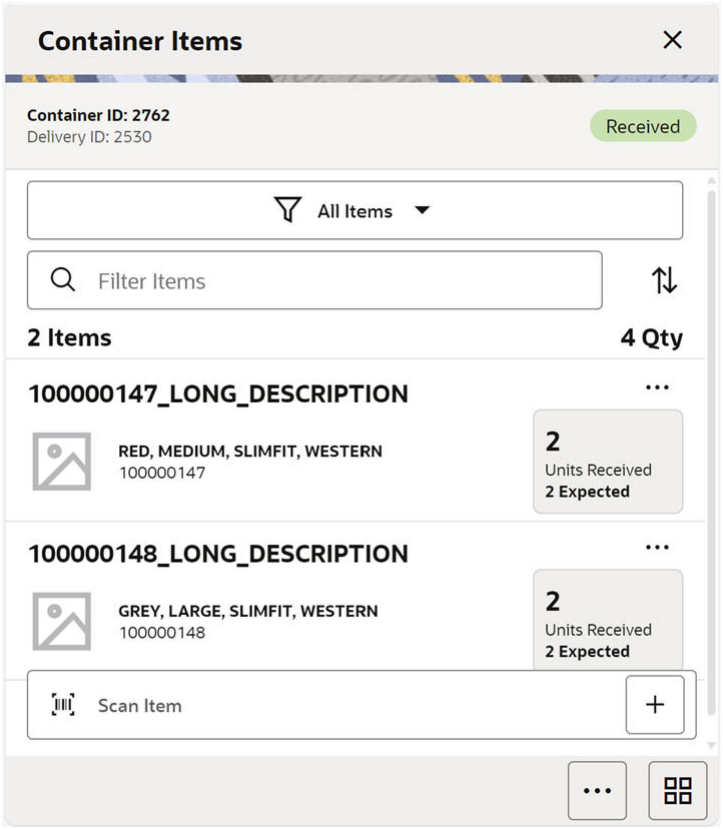


The Search Criteria screen is accessed when you select the magnifying glass on the container lookup screen. You can enter various criteria that would help you to search for a container, such as Container ID, External Container Id, Tracking Number, Status, Type, Direction, Shipment ID, Delivery ID, ASN and Item and the system returns the results on the Container Lookup screen. The search done using the search criteria is always for the current store.

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Container Items

Figure 4-82 Container Items (Transfer Receiving)



The Container Items screen is accessed after going into the details for a specific container. This screen which gives the list of items in the container is same as the container items screen that you access from the transactions with the exception this is read only. The screen details vary depending on the type of transaction the container belongs to. For example, expected quantities for an outbound container will not be displayed. You can use the scan bar to scan an item to view the details.

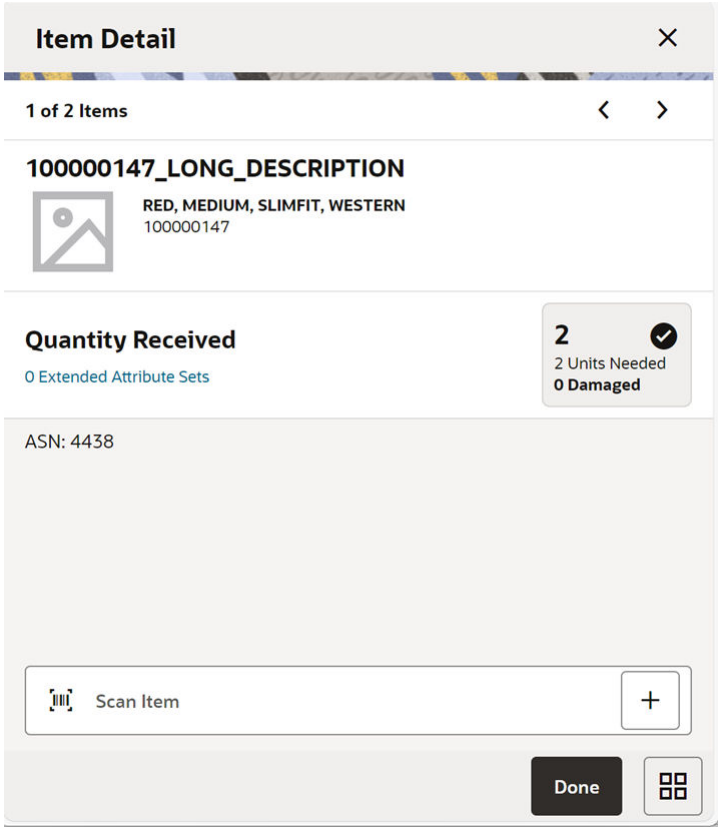
From the footer menu of this screen, you can select, Print to Print the report, Print Tickets to access the Print Ticket dialog and Info to view the information about the transaction. Using **Print Tickets** dialog, the user can submit the ticket printing to the external service for the selected container items.

For more details on this screen, refer to the respective transaction type container items screen.

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Container Lookup Item Detail

Figure 4-83 Container Lookup Item Detail Screen (Transfer Receiving)

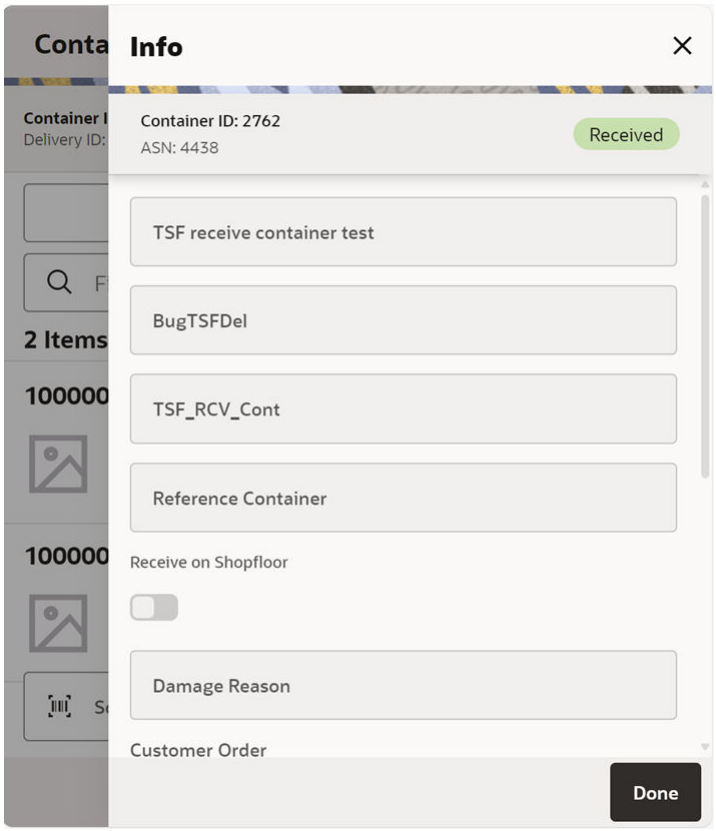


The Item Detail screen is accessed when you select an item from the container items screen after going into the item details of an item on the container. The screen content varies depending on the type of the transaction. On this screen, you can user the scan bar to go to a specific item or use the arrows to navigate to next or previous items.

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Container Lookup Info

Figure 4-84 Container Lookup Info Screen (Transfer Receiving)



The Info screen is accessed after selecting the **Info** menu option from the footer menu of the Container Items screen. The screen varies depending on the type of transaction. For example the above screen is for a transfer receiving. The Info screen in Container Lookup is the same as you see in the respective transaction dialog with the exception this is read only here.

RFID Locator

The RFID Locator functionality provides the user with the ability to locate the RFID tags in the store. This helps the store users to locate the items quickly by navigating the mobile device based on the signal strength.

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Figure 4-85 RFID Locator



The RFID Locator dialog can be accessed from the Lookup menu.

The search field on the scan bar is item. The user can scan or enter the item barcodes.

This screen is used for locating the RFID Tag in the store. The purpose of the RFID Locator functionality is to enable the user to find the specific unit where it is placed in the store via RFID scanning.

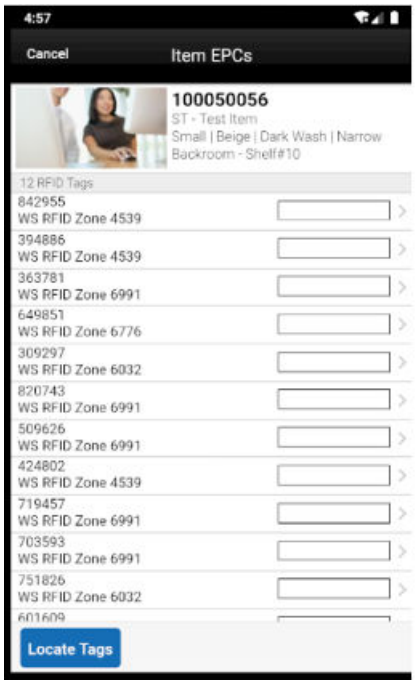
If the user has scanned/entered an EPC and if the corresponding item of the scanned EPC contains more than one EPCs/Tags in the system, the system takes the user to the Item EPCs for the user to select the appropriate tag to find it.

If the user has scanned/entered an EPC and if the corresponding item of the scanned EPC contains only one EPC that is the scanned EPC, the system takes the user to the RFID Tag Finder showing the signal strength.

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Item EPCs

Figure 4-86 Item EPCs



On this screen, the system displays the list of found active RFID tags based on the provided item.

From the list, the user can select a specific tag to start locating the tag or select **Locate Tags** option to start searching the listed tags using the radar and display the strength of the signal.

On the list, the system displays the Tag id and the description of the item along with the item information on the header.

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RFID Tag Finder

Figure 4-87 Tag Finder



The user reaches this screen via the RFID Locator screen if the tag id was scanned or entered. Alternatively selecting the RFID Tag from the Item EPCs screen will bring the user here as well.The system displays the signal strength to indicate how close the tag is while the user moves around the search area holding the trigger on the scanner.When the user enters this screen, the system automatically starts the process to locate tags and the user can select to stop locating.On the header, the system displays the item information.

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5

Inventory Adjustments

This chapter is divided into three sections:

- Inventory Adjustments Mobile (MAF)
- Inventory Adjustments Mobile (JET)
- Inventory Adjustments Desktop
- Inventory Adjustments Process

Inventory Adjustments Mobile (MAF)

Inventory Adjustments allow a user to change the number of units in stock or mark them as non-sellable due to damage and other reasons:

The following features are available:

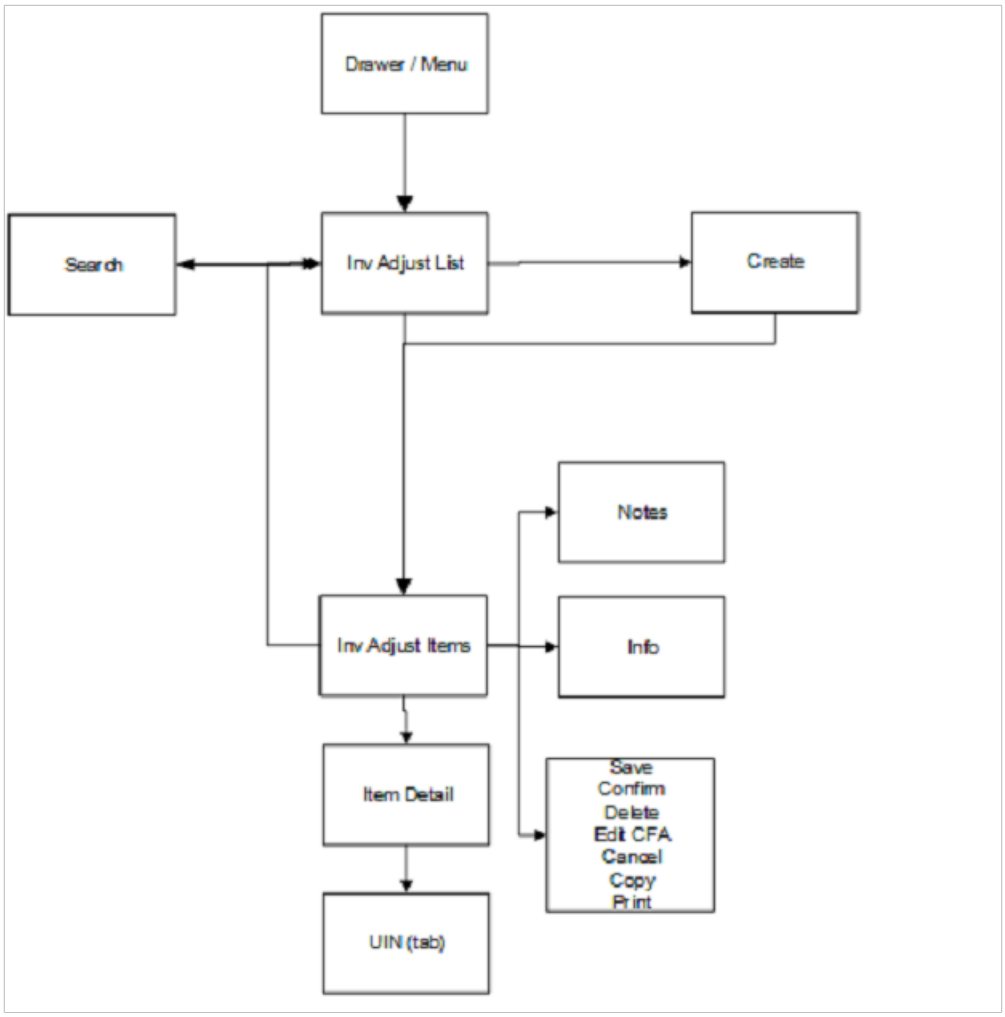
- Search for inventory adjustments
- Create a new inventory adjustment
- Copy an existing inventory adjustment
- View or edit an existing inventory adjustment
- Delete In Progress adjustments
- Print inventory adjustments
- Enter values for CFAs (Custom Flexible Attributes)

The following topics are described in this section:

- Inv Adjust List
- Search Criteria (Inventory Adjustment)
- Inv Adjust Items
- Item Detail
- Edit CFAs
- Info Screen (Inv Adjust Items)

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Figure 5-1 Inventory Adjustment Mobile Screen Flow

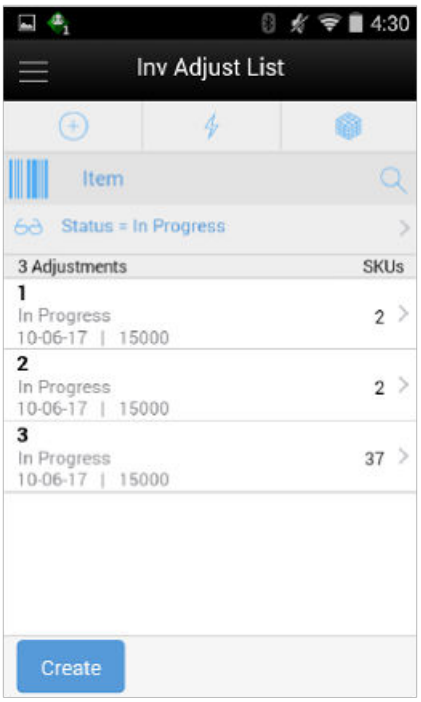


Inventory Adjustments are accessed through the Inventory Adjustment menu within the drawer. Selecting the menu option takes you to the Inv Adjust List screen. On this screen, you have the option to search for adjustment records that are presented on the Inv Adjust List screen. You can create an inventory adjustment, edit, or view an adjustment. When creating, editing, or viewing an inventory adjustment, you are first directed to the list of items on the Inv Adjust Items screen. You can add, view, and edit the details of the items on the Item Detail screen. You can specify values for CFAs (Custom Flexible Attributes) set up for inventory adjustments via the Edit CFAs screen.

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Inv Adjust List

Figure 5-2 Inv Adjust List Screen



When navigating to **Inventory Adjustments**, the **Inv Adjust List** screen displays the 'In Progress' adjustments as the default list. All manually created inventory adjustments as well as those created by an external system, such as through the web service, appear in the list screen.

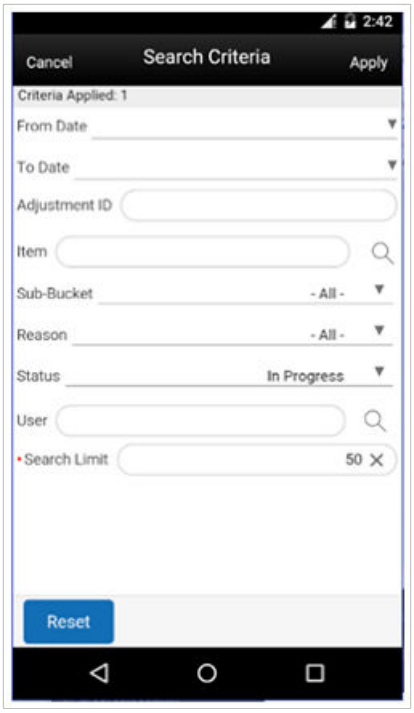
You can use the search criteria eye glasses to navigate to the Search Criteria (Inventory Adjustment) screen to enter search criteria for inventory adjustments. When scanning/entering an item in the scan bar, the system adds the item to the entered search criteria and narrows down the current list of adjustments.

Creating a new adjustment directs you to the Inv Adjust Items screen with no details (items) to build a new inventory adjustment. Selecting an adjustment from the list navigates you to the details for that adjustment.

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Search Criteria (Inventory Adjustment)

Figure 5-3 Search Criteria Screen (Inventory Adjustments)

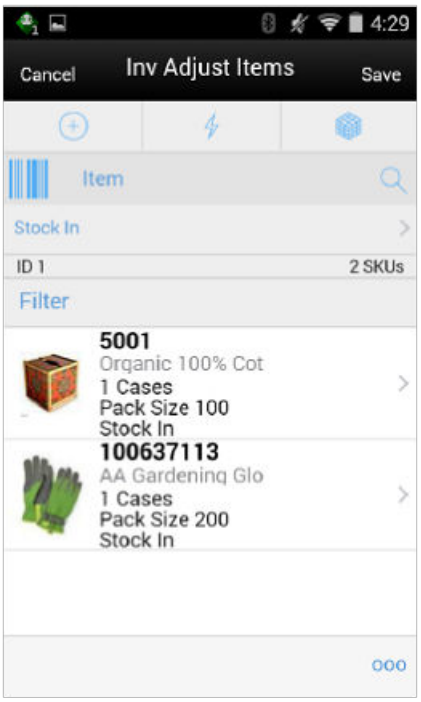


The **Inventory Adjustment Search Criteria** screen is accessed by the eye glasses on the **Inventory Adjustment List** (Inv Adjust List) screen. After applying the search criteria, the results are listed on the Inv Adjust List screen and the criteria applied is shown.

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Inv Adjust Items

Figure 5-4 Inv Adjust Items Screen



The **Inv Adjust Items** screen is where a new adjustment is created. Initially, this screen will not have any items. The items screen is also displayed when selecting an existing adjustment. The items are listed for the adjustment. The item image for the line items is displayed per configuration.

Line items appear in a list and selecting a line item navigates to the item details of that item. If the item scanned is a UIN item, the user will directly navigate to the UIN tab in the Item Detail screen.

If an item has been changed in the current session, it is indicated by a bar on the left of the item. Scrolling in the list of items displays a filter. The filter can be used to narrow down the list of items. Filtering can occur by item ID, description, reason, and unit of measure.

A reason code must be selected before being able to add or edit an item on the adjustment. The reason code selected is at the header level and is applied to all newly added items until it is changed to a different reason in which the newly changed reason is added to the items. The reason codes have a disposition associated to them which determines stock movement of the item. See Inventory Adjustments Process.

Scanning or entering an item in the scan bar navigates you to the Item Detail screen for that item. The quantity may be updated depending on the scan mode.

The item must be unique on the adjustment.

The ellipsis in the lower right hand corner accesses the footer menu which contains all of the functions that can be performed on an inventory adjustment.

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Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Inv Adjust Items screen. The menu functions include the following:

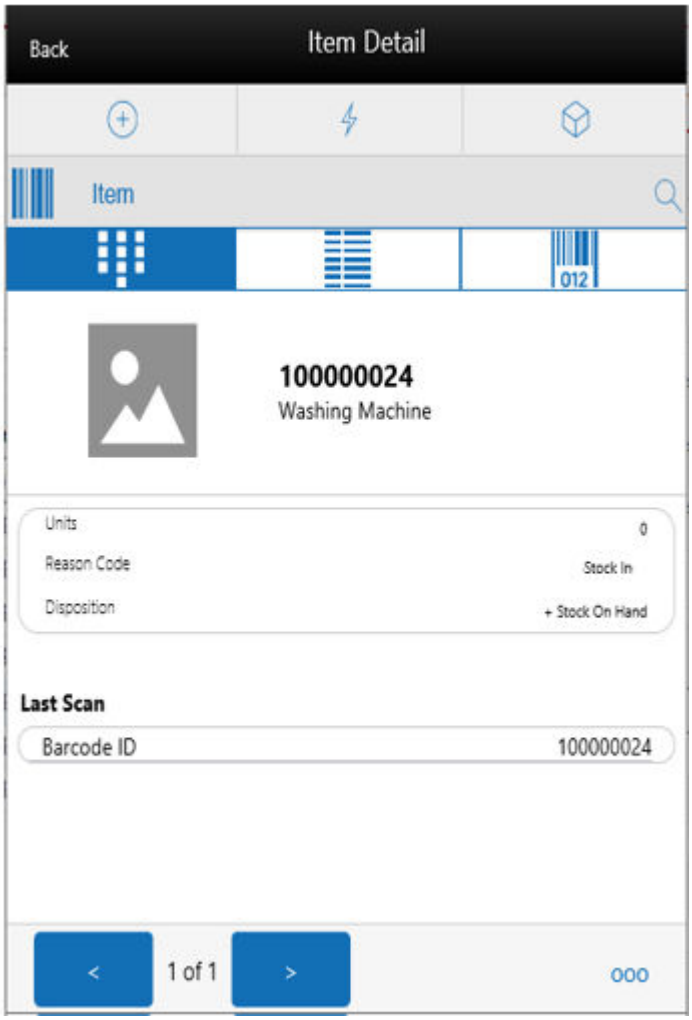
- **Info**: Accesses the Info popup.
- **Notes**: Accesses the notes dialog to capture notes.
- **Edit CFAs**: Lets the user enter values for the CFAs that are set up for inventory adjustments.
- **Confirm**: Confirms and completes the adjustment. All stock on hand updates are made and the adjustment is published out.
- **Save**: Saves the adjustment in 'In Progress' status to be completed later.

  Saving an adjustment does not publish the adjustment nor does it reserve any inventory; it simply saves it. The Save button can be used to implement a Save and Approval process. After saving, user will be taken to the Inv Adj List screen.
- **Save and Continue**: This will perform the same function as 'Save' option however the user remains in the same screen after save.
- **Delete**: Marks the inventory adjustment to 'Canceled' status.
- **Cancel**: Exits the adjustment; changes made in that session are not saved.
- **Print**: Displays the common print dialog to print the inventory adjustment report.
- **Copy**: The copy function is only available for those adjustments in a 'Completed' status. It takes the current adjustment, copies the items, reasons, and quantities, and creates a new editable adjustment with a new ID. It references the copied adjustment's ID.

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Item Detail

Figure 5-5 Item Detail Screen (Quantity)



The **Item Detail** screen is used for selecting or scanning an item from the Inv Adjust Items screen. Scanning or entering an item on this screen in the scan bar, updates the quantity per the scan mode and refreshes the Item Detail screen for the item and quantity scanned.

The quantity can be edited and updated manually if permissions allow. The system validates the inventory bucket based upon the disposition associated to the reason code. A reduction adjustment in inventory may exceed available inventory, bringing total available as a negative value. However, an unavailable inventory adjustment can never make the non-sellable unavailable bucket go negative. The same is true for sub-buckets, when sub-buckets are used, the reduction of a sub-bucket must be less than or equal to total quantity of such a sub-bucket. Increases for available, or non-sellable unavailable have no restriction.

The item information including the image (which is system configured) displays in the header. The bottom portion of the screen contains information fields for reason code, disposition, sub-bucket (if system configured), and the stock on hand pertaining to the bucket in which the stock

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is coming from. At the bottom of the screen the details of the last scanned barcode will be displayed.

The footer menu, ellipsis button, contains a reset function as well as remove and restore functions. You can page through existing items on the adjustment using the arrows on the bottom.

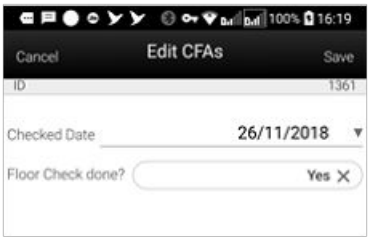
The **Item Detail** screen has a UIN tab to take user to the UIN screen to add/remove UINs for UIN items (if system is configured to use UINs and if the item is a UIN item). If the user scans a UIN item, the user will directly navigate to the UIN tab in the Item Detail screen for that item.

- All non-AGSN (Auto Generated Serial Numbers) UINs require UINs to be captured, regardless of the disposition of stock movement. The quantity field cannot be entered for non AGSN UIN items. It gets updated as the UINs get added and removed from the adjustment.
- For AGSN items, if a reason code has a disposition of anything except Out of Stock to In Stock (+Stock on Hand), a UIN is required to be captured. This is because the UIN already exists in the system and the system needs to know which AGSN UIN is being adjusted. In this case, the quantity field cannot be entered; it is updated as the AGSN is added/ removed.
- For AGSNs being adjusted from Out of Stock to In Stock (+ Stock on Hand), the system auto generates the AGSN number and print upon completion of the adjustment. This means that capturing of the AGSN is not required and the quantity can be entered. However, you may still capture the serial number if one exists. In this case, the system auto-generates the serial numbers and print for those where the quantity entered exceeds the UINs captured.

The Extended Attributes tab enables the user to view/capture Extended Attributes for the item. If the item is not configured to capture extended attributes or there are no extended attributes captured, the list will be empty.

Edit CFAs

Figure 5-6 Edit CFAs Screen



The Edit CFAs screen displays the list of CFAs (flexible attributes) that have been set up for Inventory Adjustments in the desktop application, and lets you enter values for them. The CFAs that are set up as 'Required' must have a value entered for it before confirming the inventory adjustment. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed for entering CFA values.

Item Maintenance Mobile (JET)

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Info Screen (Inv Adjust Items)

Figure 5-7 Inv Adjust Items Info Screen



The **Info** screen is an informational popup that contains read-only information about the header level of the adjustment. Details include adjustment ID, reference adjustment ID, status, create date, create user, approve date, approval user, and all the CFAs setup for inventory adjustments irrespective of whether a value has been captured or not. The value captured for the CFAs will also be displayed. If value has not been captured, it will display blank.

Inventory Adjustments Mobile (JET)

Inventory Adjustments allow a user to change the number of units in stock or mark them as non-sellable due to damage and other reasons: The following features are available:

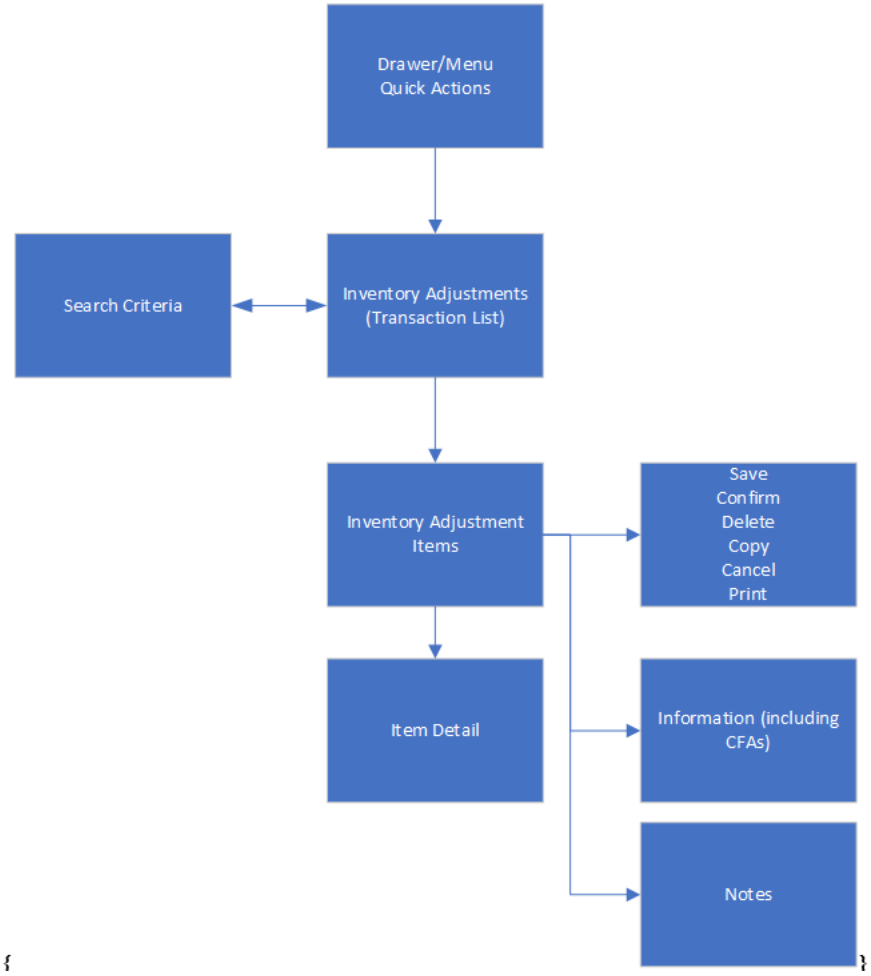
- Search for inventory adjustments
- Create a new inventory adjustment
- Copy an existing inventory adjustment
- View or edit an existing inventory adjustment
- Delete In Progress adjustments
- Print inventory adjustments
- Enter values for CFAs (Custom Flexible Attributes)

The following topics are described in this section:

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- Inventory Adjustments
- Search Criteria (Inventory Adjustment)
- Inventory Adjustment Items
- Reason Code
- Item Detail
- UIN
- Information

Figure 5-8 Inventory Adjustment Mobile Screen Flow

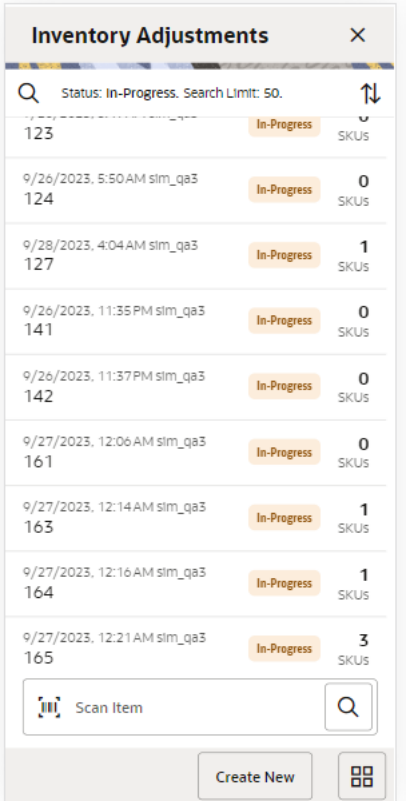


Inventory Adjustments are accessed through the Inventory Adjustment menu within the drawer or from Quick Actions. Selecting the menu option takes you to the Inventory Adjustments screen. On this screen you can search for adjustment records that will be returned in this list. The user can create an inventory adjustment by selecting the Create New option or select an existing adjustment from the list will take the user to the Inventory Adjustment Items screen where the user can edit, copy, or view items on the adjustment. The user can add, view, and edit the details of the items on the Item Detail screen. CFAs (Custom Flexible Attributes) can be set up for inventory adjustments via the Information screen where additional details about the adjustment can also be viewed.

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Inventory Adjustments

Figure 5-9 Inventory Adjustments Screen



When navigating to Inventory Adjustments, the Inventory Adjustments screen displays by default the 'In Progress' adjustments as the default list. The list can be sorted by select the sort icon.

A search can be done by selecting the search option (magnifying glass) to navigate to the Search Criteria (Inventory Adjustment) screen to enter search criteria for the inventory adjustments. The user will return to this list with the results updated.

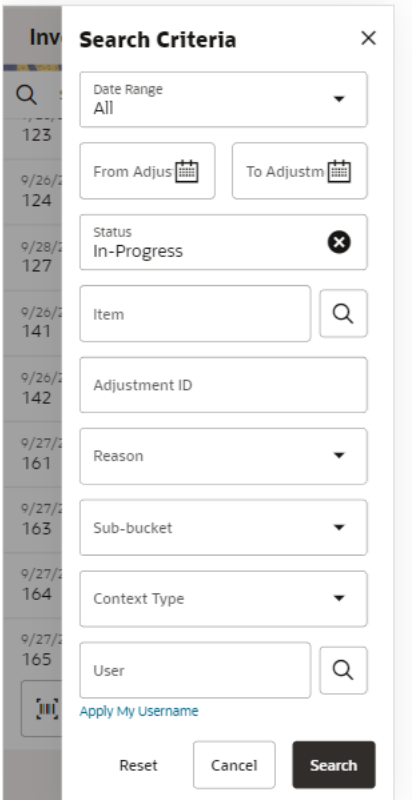
When scanning/ entering an item in the scan bar, the system adds the item to the entered search criteria and narrows down the current list of adjustments.

Creating a new adjustment directs you to the Inventory Adjustment Items screen with no details (items) to build a new inventory adjustment. Selecting an adjustment from the list navigates you to the details for that adjustment.

Search Criteria (Inventory Adjustment)

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Figure 5-10 Search Criteria Screen (Inventory Adjustments)



The Inventory Adjustment Search Criteria screen is accessed by the magnifying glass on the Inventory Adjustments screen. After applying the search criteria, the results are listed on the Inventory Adjustments (list) screen and the criteria applied is shown. Criteria will be retained until the user leaves the Inventory Adjustment dialog.

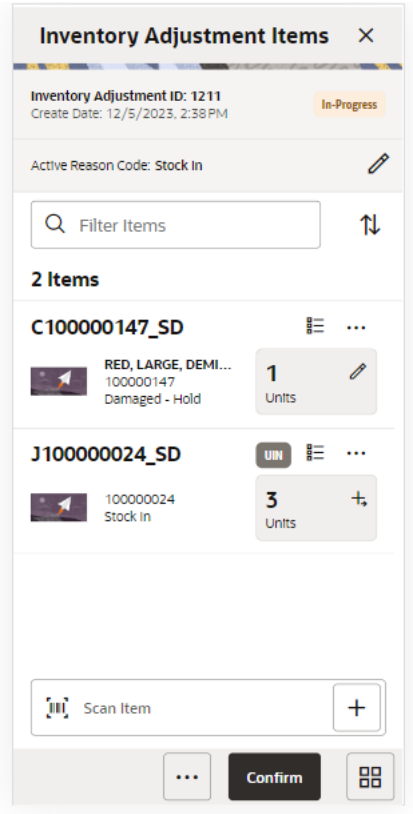
Criteria include:

- Date Range – based on the create date of the adjustment
- From / To Adjustment Date
- Status
- Adjustment ID
- Item
- Reason
- Sub-bucket (if store is configured)
- Context
- User - with a search and an "Apply My User ID”
- Search Limit – defaulted per system config and can be updated

Inventory Adjustment Items

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Figure 5-11 Inventory Adjustment Items Screen



The **Inventory Adjustment Items** screen is where a new adjustment is created. Initially, when creating a new adjustment, this screen will not have any items. This screen is also displayed when selecting an existing adjustment from Inventory Adjustments. When viewing or editing an existing adjustment, the items are listed for the adjustment. User must have edit permissions as well as data permissions for all reason codes in order to edit an adjustment. There is a Filter bar to filter on items by: Item ID, Item Description, Reason Code and UOM. The user can also sort the list of items by Item ID or Item Description. The header will contain the ID, create date, and status of the adjustment.

A reason code must be selected before being able to add or edit an item on the adjustment. The Active Reason Code that is selected at the header level is applied to all newly added items until it is changed to a different reason. Once changed, the new reason is added to the items added from that point, it will not impact already added items. If an item is added/scanned and a reason code has not yet been selected, the user will be directed to select a reason code first. Reason Codes can be edited for a specific item on the Item Detail screen. See Inventory Adjustments Process for more detail on Reason Codes and Dispositions.

Items will appear in the list. The item image for the items is displayed per user preference. Item description, ID, and Reason Code will also be displayed. The quantity to be adjusted will be editable if the user has, ‘Edit Quantity’ permission. The UOM for the quantity will be shown per UOM selected in user preferences and the quantity will be converted per the UOM. The Pack Size will be displayed if the UOM is in cases.

Quantity Validations: The system validates the inventory bucket based upon the disposition associated to the reason code. A reduction adjustment in inventory may exceed available inventory, bringing total available as a negative value. However, an unavailable inventory adjustment can never make the non-sellable unavailable bucket go negative. The same is true

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for sub-buckets, when sub-buckets are used, the reduction of a sub-bucket must be less than or equal to total quantity of such a sub-bucket. Increases for available, or non-sellable unavailable have no restriction.

Selecting a line item navigates to the item details of that item. Scanning or entering an item in the scan bar will navigate the user per the User Preference, Scan Navigate. The user will either go to the Item Detail for the item or stay on the Inventory Adjustment Items screen. The quantity may be updated depending on the scan mode. Items can only appear once on an adjustment transaction.

If the store is configured for UINs: If the item is a UIN item there will be a UIN icon denoted. Scanning an item that is a UIN item, the user will directly navigate to the UIN screen to capture UINs. Selecting the quantity for a UIN item will also navigate to the UIN screen to capture UINS.

Each item will have an ellipsis line item menu. The user can choose to delete an item, which will remove the item from the transaction. Also the user can view/capture Extended Attributes for the item. Once extended attributes are captured, there will be an icon for the attributes on the item.

Footer Menu

- **Confirm**: Confirms and completes the adjustment. All stock on hand updates are made and the adjustment is published out. User must have permission to confirm as well as data permissions for all reason codes.

The footer menu is accessed from the ellipsis footer menu on the Inventory Adjustment Items screen. The menu functions include the following:

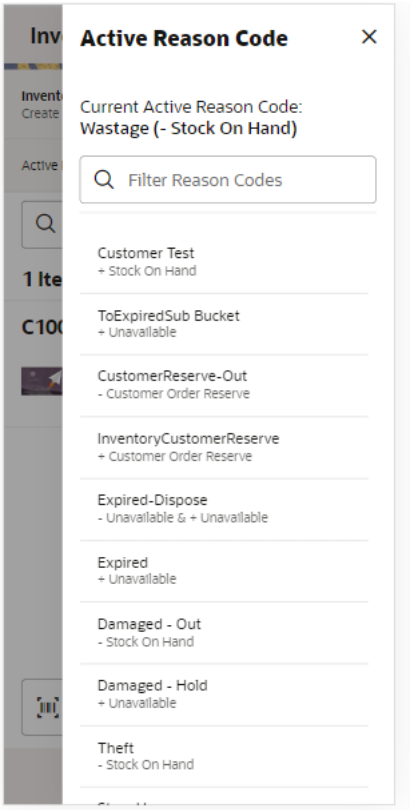
- **Notes**: Accesses the notes dialog to capture notes.
- **Print**: Displays the common print dialog to print the inventory adjustment report.
- **Info**: Accesses the Information screen to view transaction level info as well as enter values for the CFAs that are set up for inventory adjustments.
- **Back**: only for view only adjustments. Will exit the user back to where they came from.
- **Cancel**: Exits the adjustment; changes made in that session are not saved.
- **Delete**: Marks the inventory adjustment to 'Canceled' status. User must have permission to Delete as well as data permissions for all reason codes.
- **Copy:** The copy function is only available for those adjustments in a 'Completed' status. It takes the current adjustment, copies the items, reasons, and quantities, and creates a new editable adjustment with a new ID. It references the copied adjustment's ID.
- **Save and Exit:** Saves the adjustment in 'In Progress' status to be completed later.Save and Exit: Saves the adjustment in 'In Progress' status to be completed later.

Saving an adjustment does not publish the adjustment nor does it reserve any inventory; it simply saves it. The Save button can be used to implement a Save and Approval process. After saving, user will be taken to the Inventory Adjustments screen.

Reason Code

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Figure 5-12 Reason Code Screen

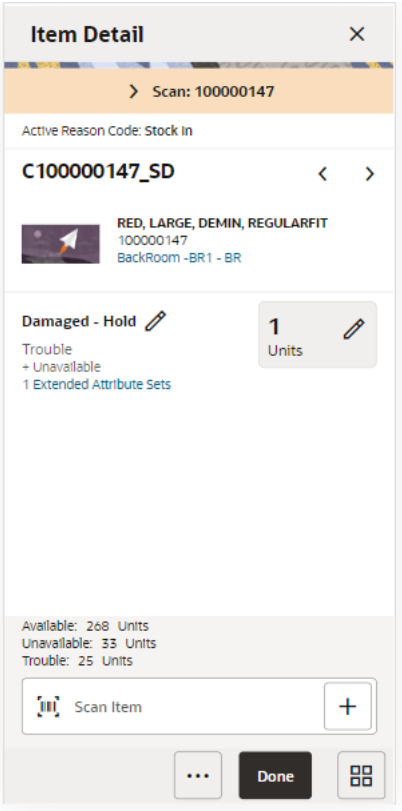


The Reason Code screen is navigated to when selecting the Active/Header level reason code on the adjustment as well as on the line item of the adjustment. The Reason Code screen is used for selecting a Reason Code on the Inventory Adjustment. The current active reason code is displayed at the top, if there is one. Those reason codes defined on the desktop with a ‘Use in UI’ flag of ‘yes’ will be displayed here. The user will only see those reason codes in the list that the user has data permissions for. The reason codes will be listed along with the associated disposition. The list can be filtered down.

Item Detail

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Figure 5-13 Item Detail Screen



The **Item Detail** screen is navigated to by selecting an item from Inventory Adjustment Items or by entering/scanning an item based upon Scan Navigate user preferences. Scanning or entering an item on this screen, updates the quantity per the scan mode and refreshes the Item Detail screen for the item and quantity scanned.

The header includes the active reason code. This is the reason code that is applied to newly added items as a default reason code. The details of the last scan are displayed as well as paging to allow to page through the items on the adjustment. Item information includes the image (per user preference), ID, description, and the primary location. Selecting the primary location will display the Item Locations for the item.

The line level reason is defaulted per the Active/Header level reason code. It can be updated for this specific item at the line level, if needed. The corresponding disposition will be displayed as well as the sub-bucket if there is one and if the store is configured for sub-buckets.

The quantity can be edited and updated manually if permissions allow. If the UOM is in cases, the pack size will be displayed and allow for editing per the system admin setting. If the item is a UIN item, selecting the quantity will navigate to the UIN screen to capture UINs. Same quantity validations as on Inventory Adjustment Items.

The Extended Attributes link navigates to the Extended Attributers screen. The user can view/ capture Extended Attributes for the item. If the item is not configured to capture extended attributes or there are no extended attributes captured, the list will be empty.

The bottom portion of the screen contains read only information regarding inventory. Available Inventory is always displayed. Unavailable will display if disposition is to / from unavailable. Customer Order Reserved will show if the disposition is to or from the customer order reserved

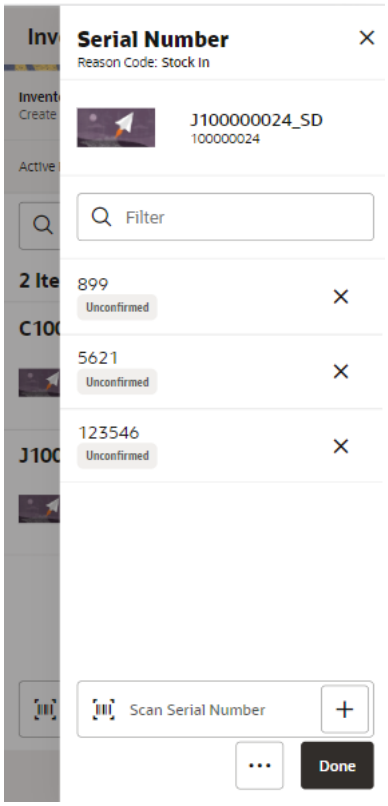
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bucket. Lastly, the sub-bucket will show if store is configured for sub-buckets and disposition is to / from an unavailable sub-bucket.

Lastly, in the footer menu the user has the option to delete an item. Delete will remove the item from the adjustment.

UIN

Figure 5-14 UIN Screen



The UIN screen allows a user to add/remove UINs for UIN items (if store is configured to use UINs and if the item is a UIN item). If the user scans a UIN item, the user will directly navigate to the UIN screen for that item.

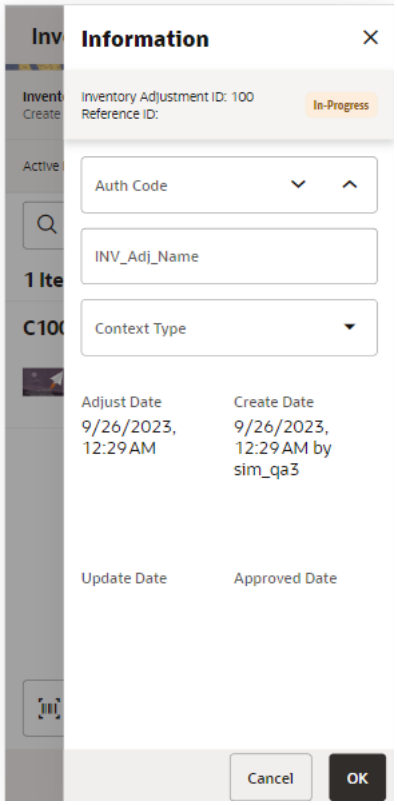
- All non-AGSN (Auto Generated Serial Numbers) UINs require UINs to be captured, regardless of the disposition of stock movement. The quantity field cannot be entered for non AGSN UIN items. It gets updated as the UINs get added and removed from the adjustment.
- For AGSN items, if a reason code has a disposition of anything except Out of Stock to In Stock (+Stock on Hand), a UIN is required to be captured. This is because the UIN already exists in the system and the system needs to know which AGSN UIN is being adjusted. In this case, the quantity field cannot be entered; it is updated as the AGSN is added/ removed.
- For AGSNs being adjusted from Out of Stock to In Stock (+ Stock on Hand), then an Auto Generate button will be available. Selecting this button will prompt the user for a quantity and the system will auto generate the UINs per the quantity.

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- User will be able to select Print from the footer menu to print tickets for those UINS that are an AGSN.

Information

Figure 5-15 Information Screen



The Information screen contains header level information about the inventory adjustment. The user can enter CFAs. Details include adjustment ID, reference adjustment ID, status, create date/user, update date/user, approve date/user.

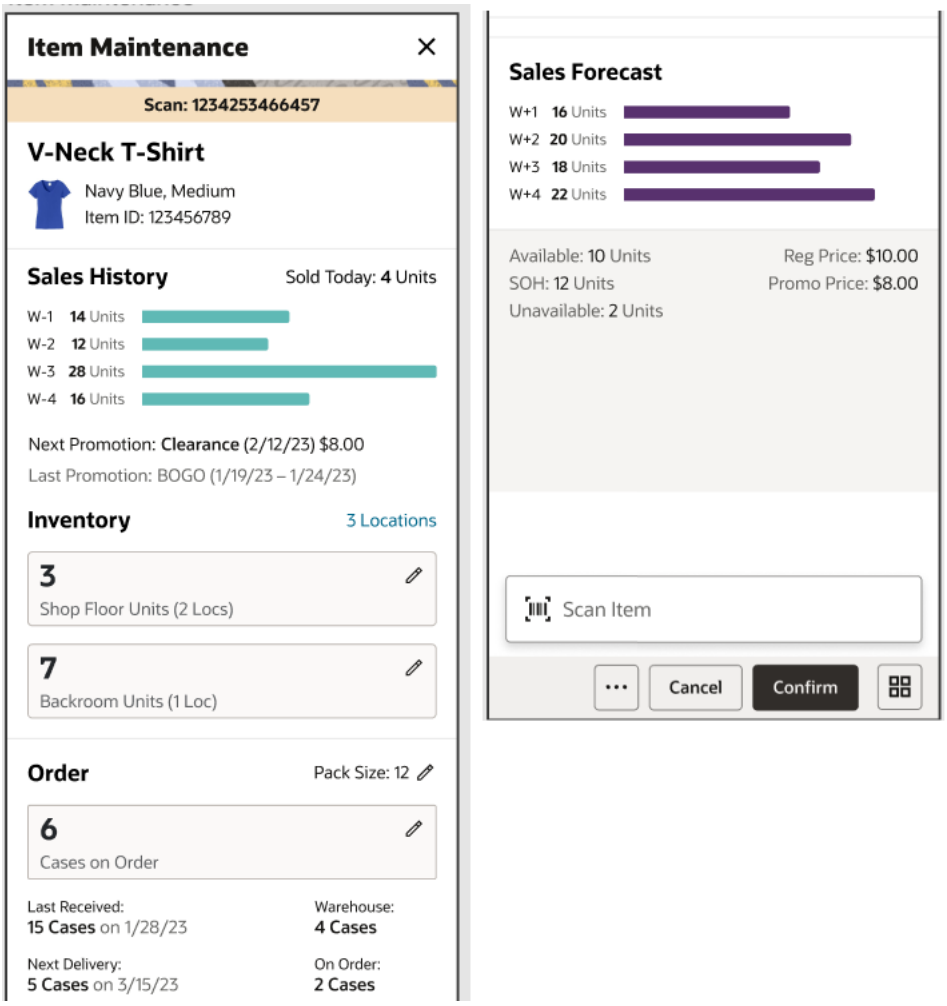
The Adjustment Date can be entered by the user if the user has Edit Inventory Adjustment Date permission. It will default to today's date. Context can be selected from a drop down of context types that are defined on the desktop and may be required per a store configuration.

The CFAs (flexible attributes) that have been set up for Inventory Adjustments in the desktop application will be displayed and lets you enter values for them. The CFAs that are set up as 'Required' must have a value entered for it before confirming the inventory adjustment. Appropriate security permission is needed for entering CFA values.

Item Maintenance (JET Mobile)

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Figure 5-16 Item Maintenance



The Item Maintenance screen can be accessed in the following ways:

- Clicking on **Item Maintenance** from the drawer menu in the main screen.
- Clicking on **Item Maintenance** from the Quick Actions menu.

> **Note**
>
> The user must have Access Item Maintenance security permission to access this screen.

The user can perform multiple actions from this screen: adjust Shop floor/Backroom inventory, request items (store order), add/remove the item from item basket and print ticket.

Sections

Inventory

The Inventory section allows for a direct update to the Shop Floor and Backroom inventory buckets if the ‘Display Shop floor / Backroom quantity’ store parameter is set to ‘Yes’. If it is set

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to ‘No’, then the Available Inventory bucket can be adjusted. The shop floor / backroom adjustment will be controlled via security permissions existing for inventory adjustment.

Order

The Order section is displayed and editable if Access Store Orders permission is set to Yes. This section allows the user to create a store order for the item scanned. Item must be ‘Active’ status. Store Order Allowed is ‘Yes.’ This is a store re-orderable indicator that is sent on from merchandising (ItemLocVirt). If the item is an ‘SO’ item, the reject indicator must be ‘No’. If any of these conditions are not met, then the order section will not be editable.

Sales History and Sales Forecast

Sales History will display if the user has ‘Display Sales History’ permission. This data is populated from Transaction History. Sales Forecast will display if the user has ‘Display Sales Forecast’ permission. For forecast information, EICS must also be configured to call the Sales Forecast web service. Both of these will be displayed in graphs with the system displaying up to four weeks of data, if the data exists. Only full weeks will be displayed.

Fields

The header contains the item ID, description and image (per user preference). Additional informational fields on this screen include:

Last Received - how many were last received on allocation, DSD, transfer.

Next Delivery - the quantity on the next delivery. It is the in transit (In bound qty) for the ASN (Transfer,DSD, allocation).

Warehouse – sum of inventory for the item at all warehouse.

On Order - This field will display the total quantity remaining on the order; Transfers + Allocations + Purchase Orders.

Available - This field holds the available stock on hand.

Unavailable - This field holds the unavailable stock on hand.

Total SOH - This field displays the total stock on hand at the store for the item.

Regular Price - This field displays the regular price of the item.

Promotional Price – This field will be displayed if there is a promotion running for the item.

Clearance Price - This field will be displayed if there is a clearance running for the item

Footer Options

Confirm – On clicking the Confirm button, the following will happen:

- A Store Order will be created with the quantity added and it will get approved automatically.
- If adjustments were made to the inventory buckets, inventory adjustment will be written with reason codes of Quick Adjustment In and Quick Adjustment Out. The adjustments are published. Transaction history is written.

Add to Item Basket - This option enables the user to add the item to the ‘Investigate’ Item basket if the user has ‘Investigate Item Basket’ security permission. This option will not exist if the item exists on an open "investigate" item basket. The item can be removed from the item basket using ‘Remove From Item Basket’ option which appears once the item gets added to the item basket.

Print Ticket -Allows the user to print a ticket if the user has Print Ticket security permission.

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Configure Screen Layout - Clicking on this option brings up a popup where the user can configure the list of sections he wants to see in the screen and also the order in which the sections are to be displayed. The list of sections include Inventory, Order, Sales History, Sales Forecast.

Inventory Adjustments Desktop

Inventory Adjustments allow a user to change the number of units in stock or mark them as non-sellable due to damage and other reasons.

The following features are available:

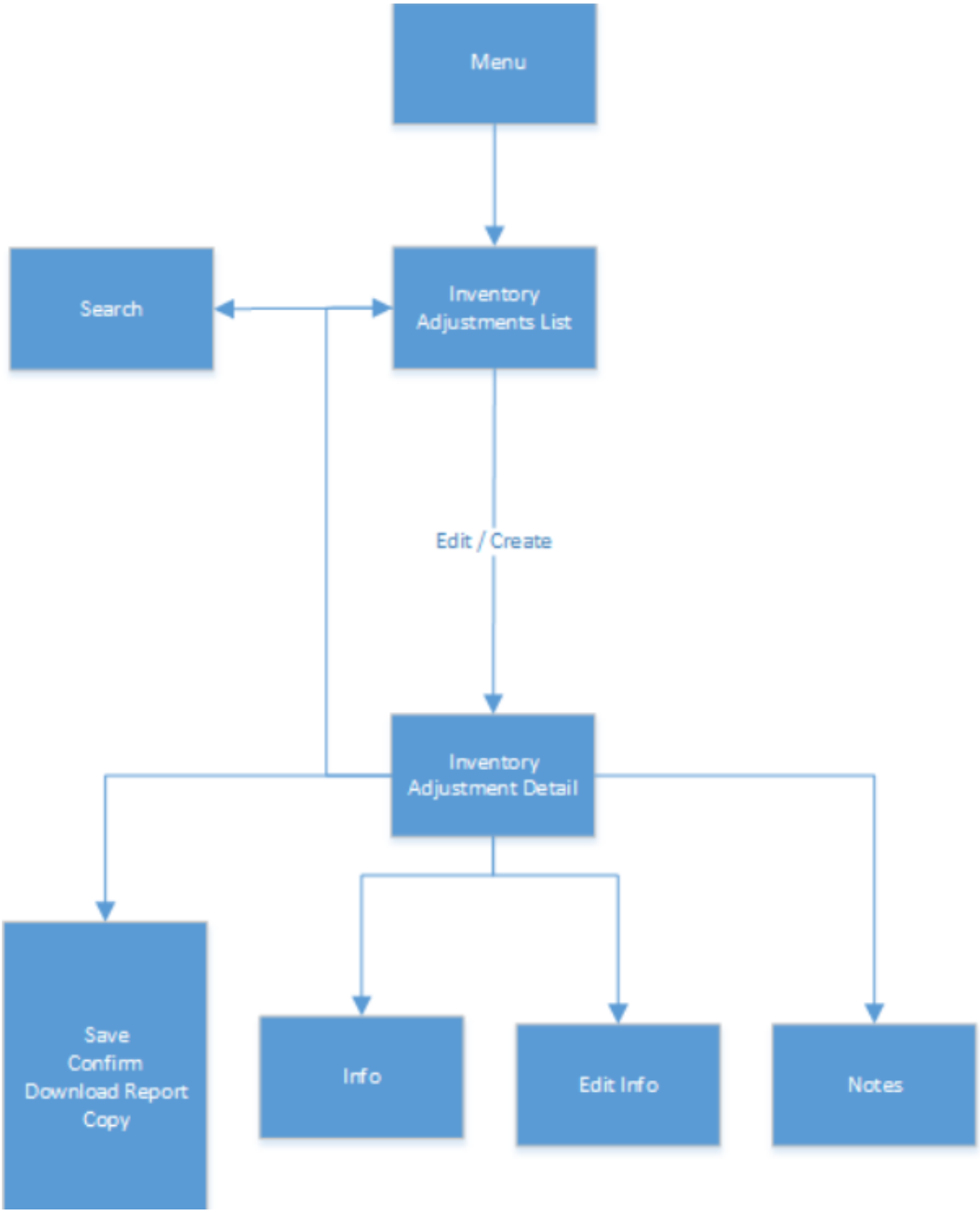
- Search for inventory adjustments
- Create a new inventory adjustment
- View or edit an existing inventory adjustment
- Delete In Progress adjustments
- Copy an existing inventory adjustment
- Download reports for inventory adjustments
- Capture values for CFAs (Custom Flexible Attributes)

The following topics are described in this section:

- Inventory Adjustment List
- Inventory Adjustment Search Criteria
- Inventory Adjustment Detail
- Inventory Adjustment - UIN
- Edit Info Popup
- Info Popup
- Download Reports Popup

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Figure 5-17 Inventory Adjustment Desktop Screen Flow



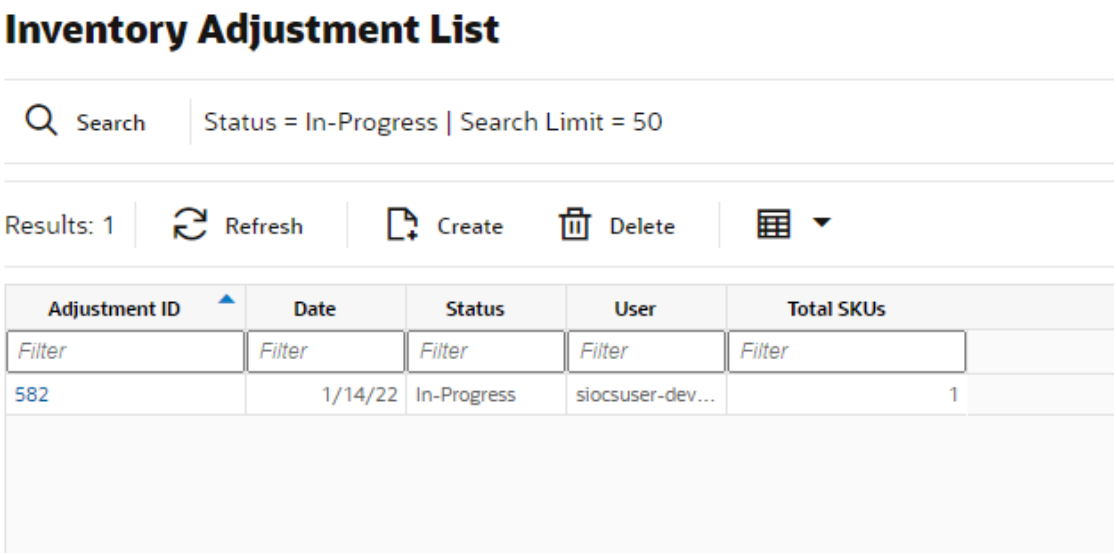
Inventory Adjustments are accessed through the **Inventory Adjustment**t menu within the Main Menu\Inventory Management. Selecting the menu option takes you to the Inventory Adjustment List screen. This screen lists the inventory adjustments available for the store. On this screen, you can search for adjustment records. You can create an inventory adjustment, edit, or view an adjustment through this screen. When creating, editing, or viewing an inventory adjustment, you are directed to the Inventory Adjustment Detail screen where the list of items on the inventory adjustment are displayed. You can add items, view, and edit the details of the items on the Inventory Adjustment Detail screen. You can specify values for CFAs (Custom Flexible Attributes) set up for inventory adjustments. You can copy a completed inventory

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adjustment. An option to download reports is also available. Also, you will be able to capture UINs for the serialized items.

Inventory Adjustment List

Figure 5-18 Inventory Adjustment List Screen



The **Inventory Adjustment List** screen enables you to view the list of inventory adjustments available for the current store. All manually created inventory adjustments as well as those created by an external system, such as through the web service, appear in the list screen. The inventory adjustments are listed in the form of a grid. The screen displays the 'In Progress' adjustments as the default list. This list will be updated when a search is performed. The list is sortable and filterable.

Use the **Search** button to navigate to the Inventory Adjustment Search Criteria dialogue where you can enter search criteria to lookup inventory adjustments.

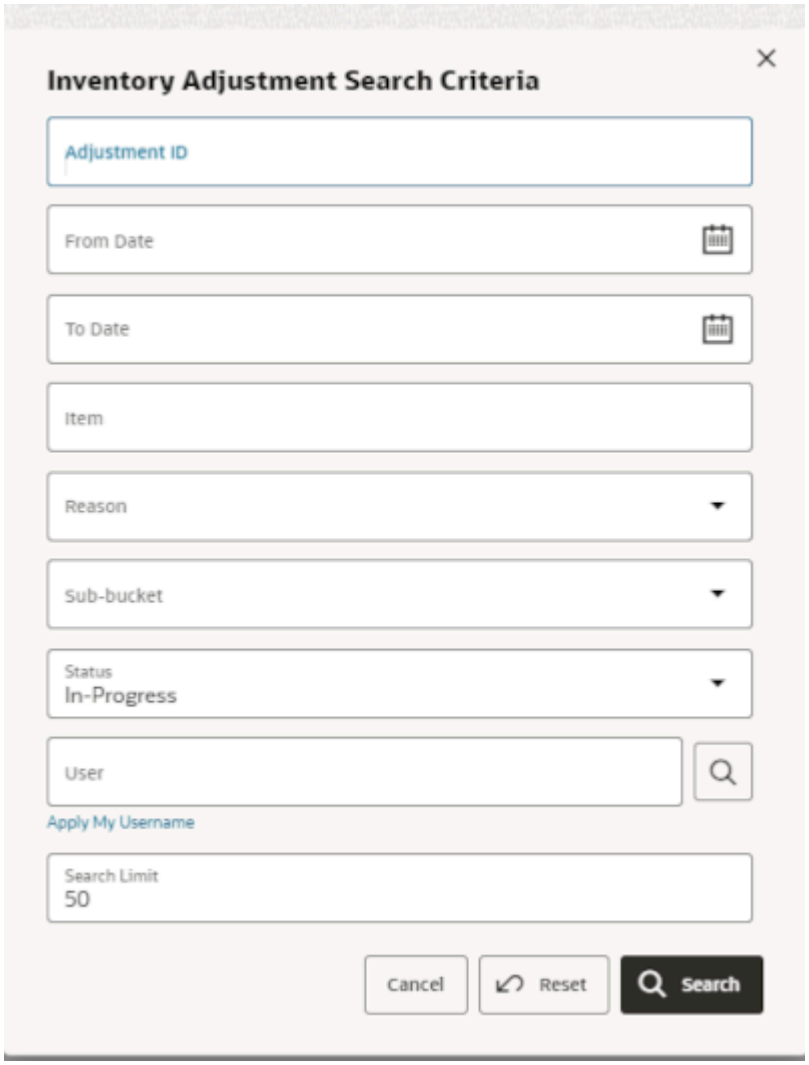
Clicking on **Create** button directs you to the Inventory Adjustment Detail screen with no details (items) to build a new inventory adjustment. You must have proper security permission for this button. Selecting an adjustment from the list navigates you to the details for that adjustment.

The **Delete** button enables you to delete an 'In progress' inventory adjustment. Appropriate security permission is needed.

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Inventory Adjustment Search Criteria

Figure 5-19 Inventory Adjustment Search Criteria

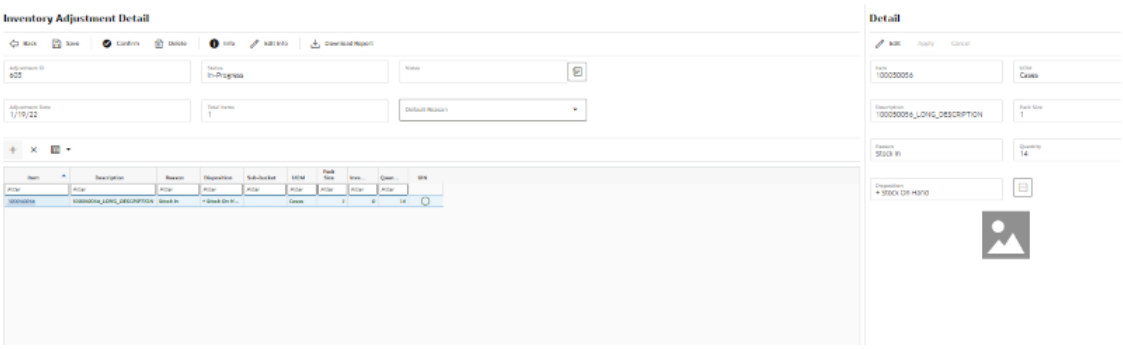


The **Inventory Adjustment Search Criteria** screen is accessed by clicking on **Search** on the Inventory Adjustment List screen. After applying the search criteria, the results are listed on the Inventory Adjustment List screen and the criteria applied is shown.

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Inventory Adjustment Detail

Figure 5-20 Inventory Adjustment Detail Screen



The **Inventory Adjustment Detail** screen is where a new adjustment is created. Initially, this screen will not have any items.

The screen is also displayed when selecting an existing adjustment. The items displayed in this screen are for the adjustment. Line items appear in a grid and selecting a line item displays the item details of that item in the Detail Block which is on the right side of the screen. You can edit 'In progress' inventory adjustments. 'Completed' and 'Cancelled' adjustments will be View Only.

A reason code must be selected before being able to add or edit an item on the adjustment. The reason code selected is at the header level and is applied to all newly added items until it is changed to a different reason in which the newly changed reason is added to the items. The reason codes have a disposition associated to them which determines stock movement of the item.

Grid

The line items are displayed in the grid with information like item id, description, reason code, UOM, quantity and so on. Item ID is a hyperlink. Clicking on the link opens the Item Detail screen for that item in a new tab in the browser.

The grid is filterable and sortable.

To add a new item to the adjustment, click on '+' button and it enables the Detail Block to enter the item and the necessary details.

To delete an item from the adjustment, select the item and click on **X** button. Upon deletion of an item, UINs (if any) are deleted.

Detail Block

All the details of a line item are displayed in this block. When a new item is added, this block will be empty. Enter the item id in the Item field. Press **Enter** or press the arrow button, and the item's detail get displayed. Enter quantity as required. The item must be unique on the adjustment.

Clicking on an existing line item enables the detail block and the details of the item such as item id, description, reason code, disposition, sub-bucket, UOM, quantity, and so on, will be displayed.

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Click **Edit** in this block to edit the details of an item. Reason code and quantity/UIN are editable.

The quantity can be updated manually if permissions allow. The system validates the inventory bucket based upon the disposition associated to the reason code. See Inventory Adjustments Process. A reduction adjustment in inventory may exceed available inventory, bringing total available as a negative value. However, an unavailable inventory adjustment can never make the non-sellable unavailable bucket go negative. The same is true for sub-buckets, when sub-buckets are used, the reduction of a sub-bucket must be less than or equal to total quantity of such a sub-bucket. Increases for available, or non-sellable unavailable have no restriction.

The item information including the image (which is system configured) displays in the detail block.

Click **Apply** to apply the changes to the adjustment and the grid will be refreshed to display the new details of the item.

Header Buttons

There are several buttons on the header of this screen which enables you to perform various actions on the adjustment:

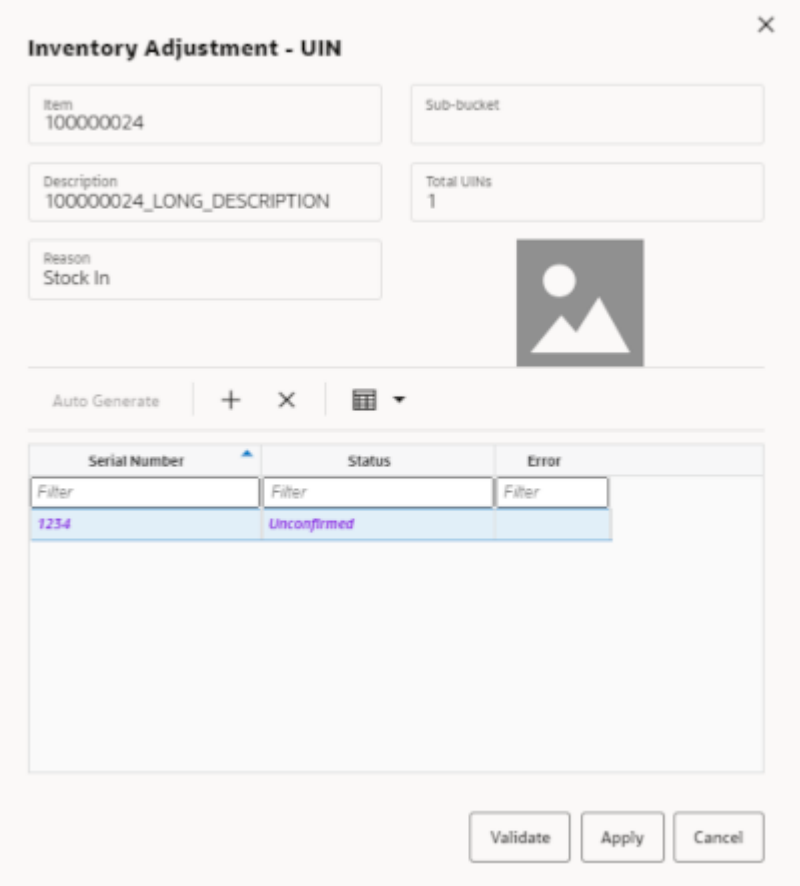
- **Info**: Accesses the Info popup which will display the details of the adjustment. View only.
- **Notes**: Accesses the notes dialog to capture notes.
- **Edit Info**: Accesses the Edit Info popup and lets you enter values for the CFAs (Custom Flexible Attributes) that are set up for inventory adjustments and any other editable fields of the adjustment like Adjustment Date.
- **Confirm**: Confirms and completes the adjustment. All stock on hand updates are made and the adjustment is published out.
- **Save**: Saves the adjustment in 'In Progress' status to be completed later.

  Saving an adjustment does not publish the adjustment nor does it reserve any inventory; it simply saves it. The Save button can be used to implement a Save and Approval process.
- **Delete**: Marks the inventory adjustment to 'Canceled' status.
- **Back**: Exits the adjustment; changes made in that session are not saved. If a new adjustment is being created, the adjustment (header) will remain saved in the database (as it was committed upon initial creation), however any items, modifications, and so on, will not be saved.
- **Download Report**: Will download the Inventory Adjustment operational report for the current inventory adjustment.
- **Copy**: The copy function is only available for those adjustments in a 'Completed' status. It takes the current adjustment, copies the items, reasons, and quantities, and creates a new editable adjustment with a new ID. It references the copied adjustment's ID.

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Inventory Adjustment - UIN

Figure 5-21 Inventory Adjustment - UIN

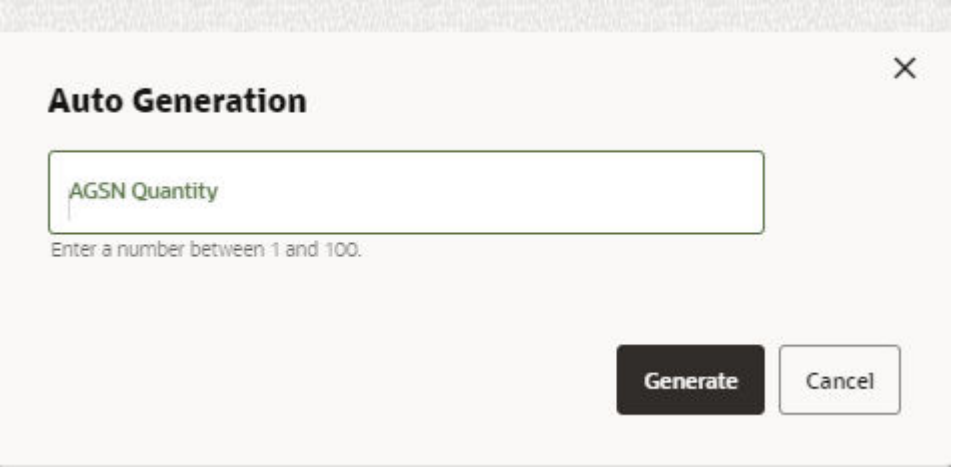


Clicking on the **UIN** icon on the Detail Block brings up the UIN tab to add/remove UINs for UIN items (if system is configured to use UINs and if the item is a UIN item).

- All non-AGSN (Auto Generated Serial Numbers) UIN items require UINs to be captured, regardless of the disposition of stock movement. The quantity field cannot be entered for non AGSN UIN items. It gets updated as the UINs get added and removed from the adjustment.

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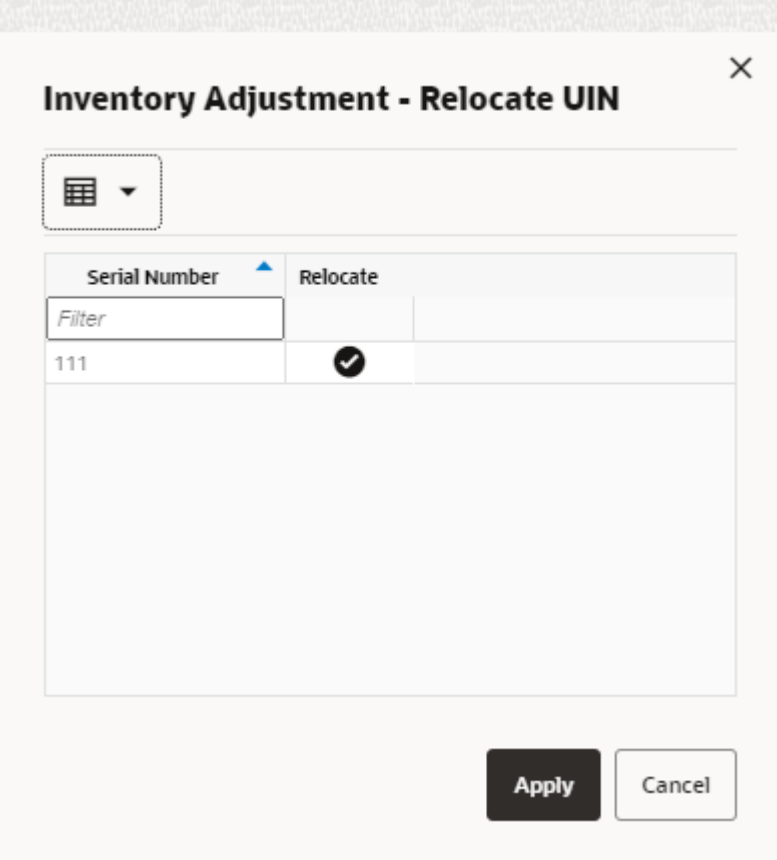
Figure 5-22 Inventory Adjustment - UIN - Auto Generation



- For AGSN items, if a reason code has a disposition of anything except Out of Stock to In Stock (+Stock on Hand), a UIN is required to be captured. This is because the UIN already exists in the system and the system needs to know which AGSN UIN is being adjusted. In this case, the quantity field cannot be entered; it is updated as the AGSN is added/ removed.
- For AGSNs being adjusted from Out of Stock to In Stock (+ Stock on Hand), the system auto generates the AGSN number and print upon completion of the adjustment. This means that capturing of the AGSN is not required and the quantity can be entered. However, you may still capture the serial number if one exists. In this case, the system auto-generates the serial numbers and print for those where the quantity entered exceeds the UINs captured.

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Figure 5-23 Inventory Adjustment - UIN - Relocation

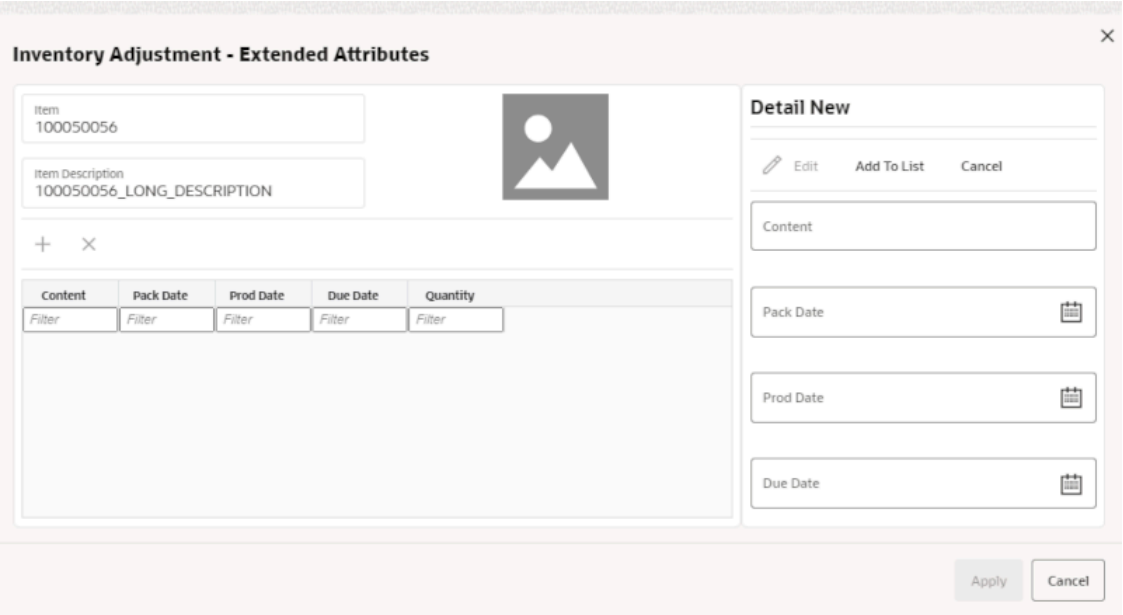


The **Inventory Adjustment - Relocate UIN** popup is used when a UIN is added that is for another store. This enables you to choose the UINs to relocate. `System admin Allow Store UIN Relocation` should be set to **Yes**.

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Inventory Adjustment - Extended Attributes

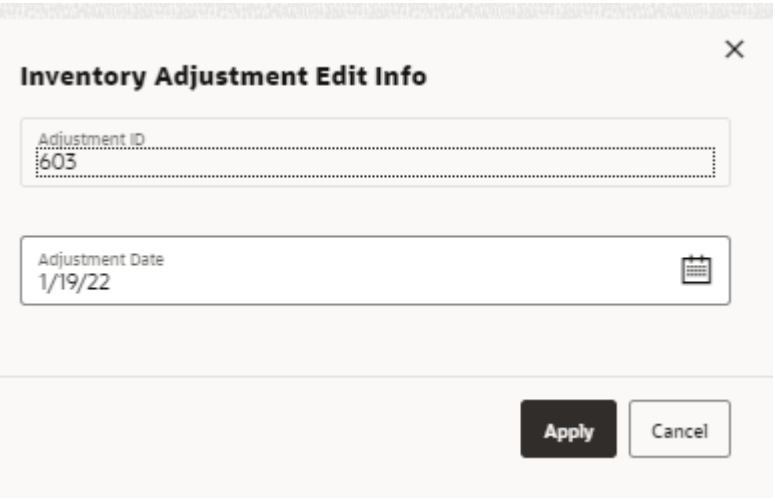
Figure 5-24 Inventory Adjustment - Extended Attributes



The user will navigate to the **Inventory Adjustment Extended Attributes** screen upon clicking on the **Extended Attributes** icon on the Inventory Adjustment Detail screen. This screen is only available for items that are part of merchandise hierarchies that are configured/ setup for extended attributes. Also, the store must be configured to capture **Extended Attributes**. This screen will display all extended attributes that get auto captured from a GS1 barcode (per system configuration). The user is also able to enter extended attributes manually for the item here.

Edit Info Popup

Figure 5-25 Edit Info Popup



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The **Edit Info** popup is accessed from Inventory Adjustment Detail screen by selecting **Edit Info** and can be accessed for editable Inventory Adjustments. Appropriate security permission is needed to access the popup.

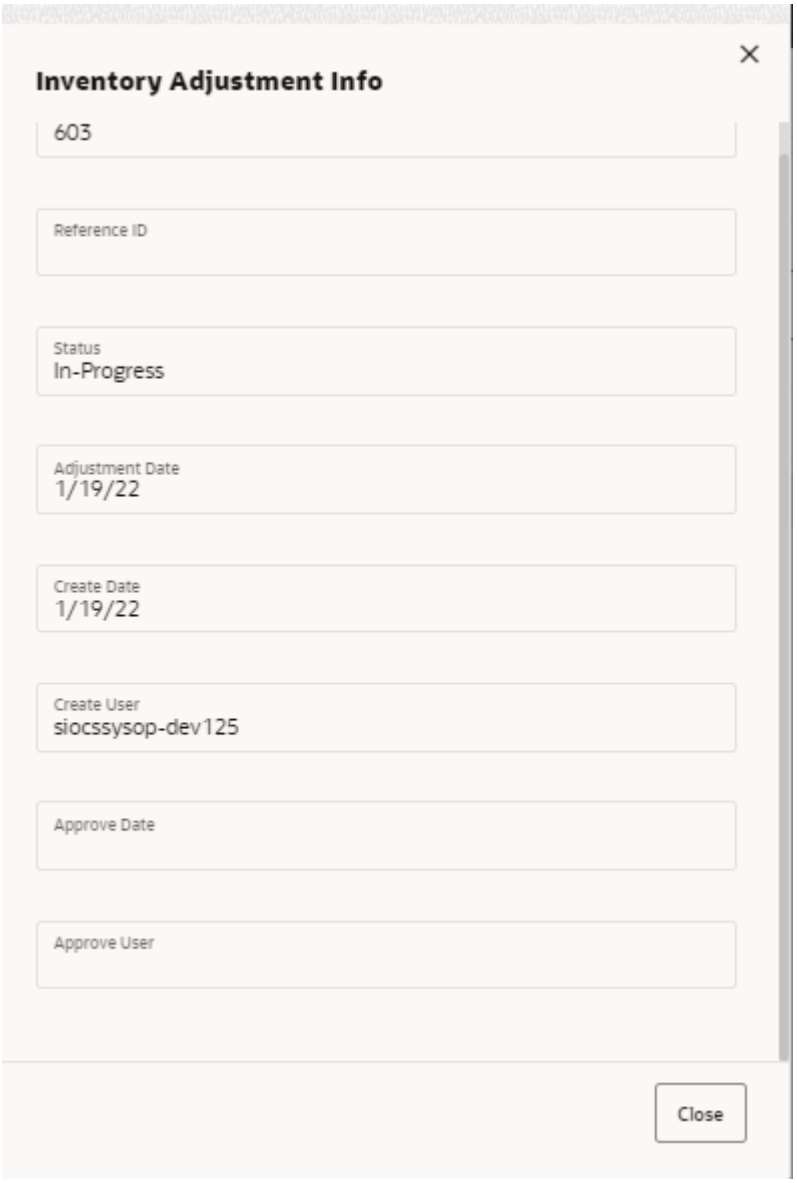
If the user has the ‘Edit Inventory Adjustment Date’ permission, the Adjustment date will be editable via this popup. The adjustment date is an alternative date that allows you to identify when the inventory transaction happened if different from the time the transaction is created. The date has no impact on when the transaction is applied, the transaction will always be applied immediately when approved, regardless of this date. This is the date communicated to external systems.

The popup displays the list of CFAs (custom flexible attributes) that have been set up for Inventory Adjustments, in the desktop application and lets you enter values for them. The CFAs that are set up as 'Required' must have a value entered for it before confirming the inventory adjustment. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed for entering CFA values.

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Info Popup

Figure 5-26 Inventory Adjustment Info Popup

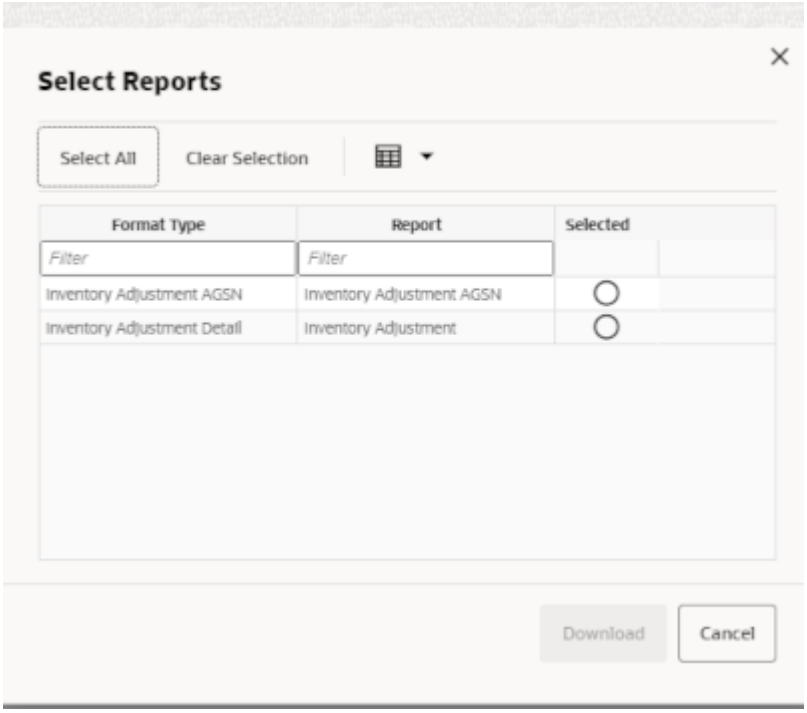


The **Info** screen is an informational popup that contains read-only information about the header level of the adjustment. Details include adjustment ID, reference adjustment ID, status, create date, create user, approve date, approval user, and the CFAs.

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Download Reports Popup

Figure 5-27 Select Report Popup (Download Report)



This popup can be accessed by clicking on **Download Report** from the Inventory Adjustment Detail screen. Selecting a format and clicking on **Download** will download the Inventory Adjustment operational report for the current inventory adjustment.

Inventory Adjustments Process

Reason codes are defined on the desktop. When creating a reason code, a disposition is assigned to the reason code and it defines how the stock will be moved. So, adjustments are made to different buckets depending on the reason code's disposition. For example: a reason code of **Stock - In** has a disposition of + Stock on Hand which moves inventory from Out of the store to **Available** inventory where as, a **Reason if Damaged - Hold** has a disposition of + Unavailable that moves inventory from **Available** to **Unavailable**.

The system will display the inventory value for the bucket in which inventory is being removed from.

Table 5-1 Inventory Adjustment Dependent on Reason Code Disposition

Reason Code Disposition	Adjustment
If the reason code disposition is taking inventory out of the available bucket, then the Inventory field will display the available stock for the item at the store.	• +Unavailable (Available -> Unavailable) • -Stock on Hand (Available -> Out) • +Customer Order Reserve (Available -> Customer Order)

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Table 5-1 (Cont.) Inventory Adjustment Dependent on Reason Code Disposition

Reason Code Disposition	Adjustment
If the reason code disposition is taking out of the unavailable bucket, and sub-buckets are not turned on, then the Inventory field will be displaying the unavailable stock for the item at the store.	• -Unavailable (Unavailable -> Available) • -Stock on Hand & - Unavailable (Unavailable -> Out)
If the reason code disposition is taking out of unavailable stock and the system is configured to use sub-buckets, then the Inventory field will display the stock for the item/store's sub-bucket.	• -Unavailable & + Unavailable (Unavailable -> Unavailable) • -Unavailable (Unavailable -> Available) • -Stock on Hand & - Unavailable (Unavailable -> Out)
If the reason code disposition is taking from Customer Order Reserved, the Inventory field will display the Customer Order Reserved qty.	• -Customer Order Reserve (Customer Order -> Available)
If the reason code disposition is taking from "Out", meaning outside the store, the Inventory field will be not displayed, as there is not a way to know what "out" contains.	• +Stock on Hand (Out -> Available)

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6

Direct Store Delivery

This chapter covers Direct Store Delivery (DSD). The following topics are covered:

Business Cases

Screen Flow

Functionality: Description of available screens.

Direct Store Delivery MAF Mobile

Direct Store Delivery JET Mobile

Business Cases

Four business case examples are shown below:

DSD Receiving Process for PO Based Delivery with ASN

1. Corporate office places a purchase order to the vendor and instructs the vendor to supply the goods directly to the store.
2. Supplier ships the goods with the ASN to the store and the store receives the goods against the ASN.

DSD Receiving Process for PO Based Delivery without ASN

1. Corporate office places a purchase order to the vendor and instructs the vendor to supply the goods directly to the store.
2. Supplier ships the goods, but no ASN is sent to the store and the store receives the goods against the PO.

DSD Receiving Process without PO

Stores that are allowed receiving the goods without purchase order can verbally place the order to the vendor and create those receipts on the fly.

DSD Receiving Process via DEX/Nex

Direct **EX**change (**DEX**) is the electronic exchange of information between a vendor's hand-held computer and a store's direct store delivery (DSD) system.

DEX transmits data to a store's DSD system using the EDI transaction set 894 (Delivery/ Return Base Record). The standard for this transaction set is UCS 004010 894 and is maintained by the UCC.

The system supports to create the DEX/Nex type deliveries using the web services. The functionality of DEX/Nex type deliveries within the DSD receiving module would be same as on the fly delivery created by you with the exception of originating type which is DEX/Nex.

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The external system that is responsible to generate the DEX/Nex delivery would leverage the service exposed by the system to integrate and upload the DEX/Nex type deliveries in to the database.

Direct Store Delivery MAF Mobile

Overview

A direct store delivery is a delivery in which the supplier drops off merchandise directly at the store. These deliveries, received directly at the store, can be against a planned delivery, an existing purchase order (PO) raised by the corporate or by the store, or a purchase order on the fly. The delivery supports containers coming in directly with Advance Shipment Notice (ASN) or the system will create a container when the ASN is loaded in the system. Even for receipts without ASN the system will allow you to create containers.

The store can receive partial shipments, resulting in multiple deliveries against a single purchase order.

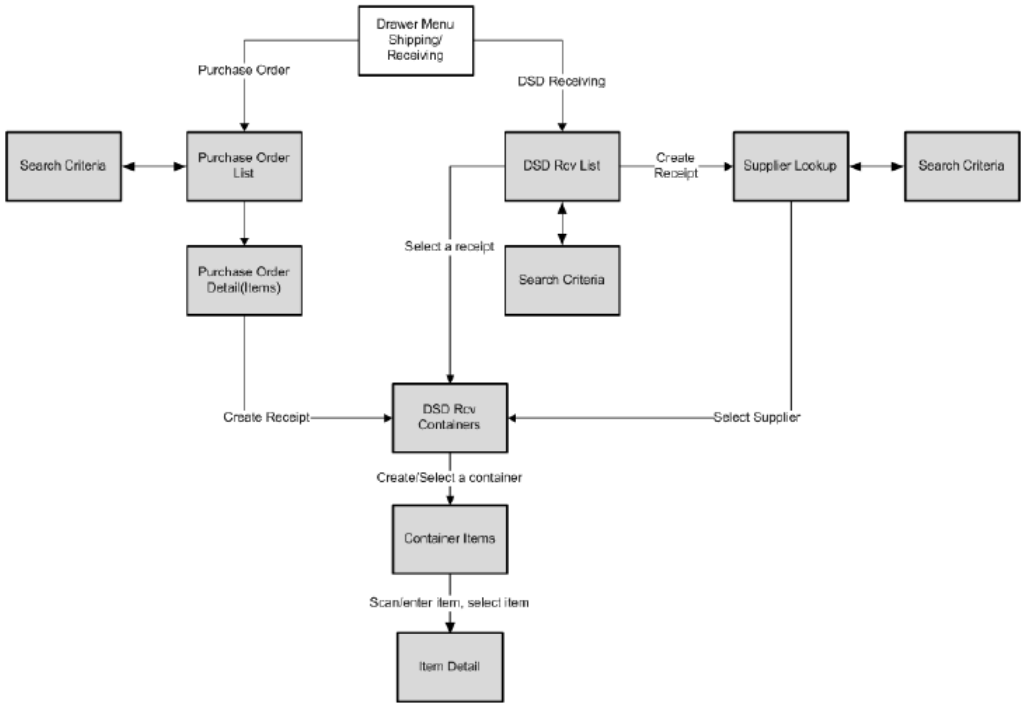
Features

- Direct deliveries against a Purchase Order (PO) and with Advance Shipment Notice (ASN) from the supplier. This feature also supports containers coming directly from the source and allows you to create additional containers.
- Receive on shop floor directly or back room/delivery bay.
- Direct deliveries against a PO and without ASN from the supplier. You can receive the delivery by creating one or more containers.
- Direct deliveries without a PO.
- **D**irect **EX**change (**DEX**)/Nex type deliveries.
- Capture values for Custom Flexible Attributes (CFA) at the direct store delivery and containers level.

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Screen Flow

Figure 6-1 Direct Store Delivery Mobile Screen Flow



You can access DSD Receiving and Purchase Order options from the Shipping and Receiving menu. The DSD Receiving List screen that appears after selecting **DSD Receiving,** lists all the active deliveries that are available and allows you to create or modify a receipt. You can also create a new receipt on the fly without any purchase order by selecting **Create Receipt**.

After selecting the ASN, active delivery, or supplier for creating an on the fly delivery, the DSD Receiving Containers screen appears and allows you to proceed with detailed receiving using the Container Items screen.

You can access various footer menu options such as Info, Edit Receipt, Edit CFAs, Customer Orders, External Receiver Adjustments, Notes, and so on from the DSD Receiving Containers screen to perform various individual functions.

Similarly, you can access various footer menu options such as Default Qty, Edit CFAs, Document option to select the PO for the PO based deliveries, Notes, and so on from the Container Items screen to perform various individual functions.

The Purchase Order List screen that appears after selecting **Purchase Order** allows you to view the purchase order detail and create a receipt against a PO.

When creating a receipt, the system takes you to the Receiving Item Detail screen and follows the same flow as described above.

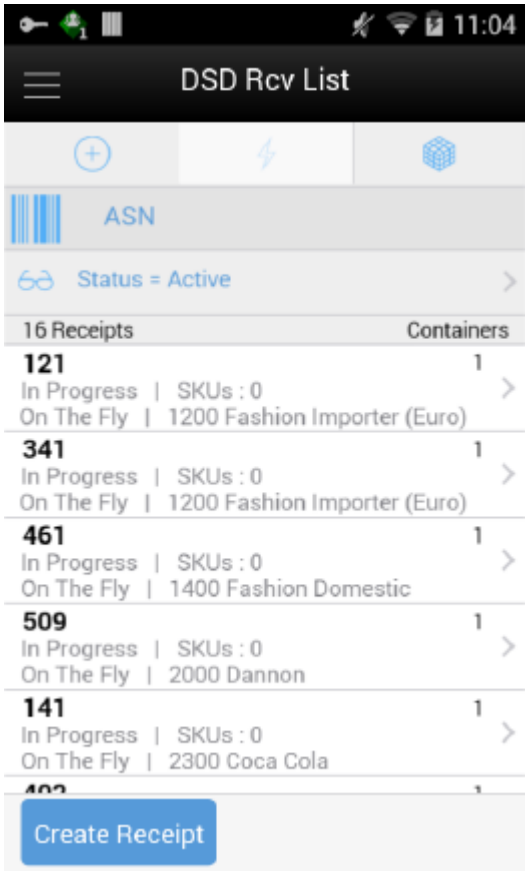
Functionality

This section describes the available screens in Direct Store Delivery.

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DSD Receiving List

Figure 6-2 DSD RCV List



The DSD Receiving List screen is accessed when you click on **DSD Receiving** from the Shipping and Receiving menu.

The DSD Receiving List by default shows all the active deliveries that are In-Progress and New for you to do the detailed receiving. It includes all types of deliveries. If the supplier has sent an ASN, it is uploaded and listed here with New status. You can select a delivery and do the detailed receiving. If the store has received a delivery via DEX/Nex service, it will be listed here and you can select to do the detailed receiving. If you have started the delivery process, it shows the delivery with the In-Progress status. You can select the In-Progress deliveries to continue the receiving. You can also select the completed deliveries to do the adjustment.

The deliveries created in the mobile application are shown with the type On the Fly.

The deliveries that have ASN from the source are shown with the type ASN.

The deliveries that are PO based and no ASN are shown with the type PO.

The deliveries that are of DEX/Nex based are shown with the type DEX/Nex.

DSD Receipts that are affiliated with a customer order will be indicated with the text 'CO' at the receipt level on this screen.

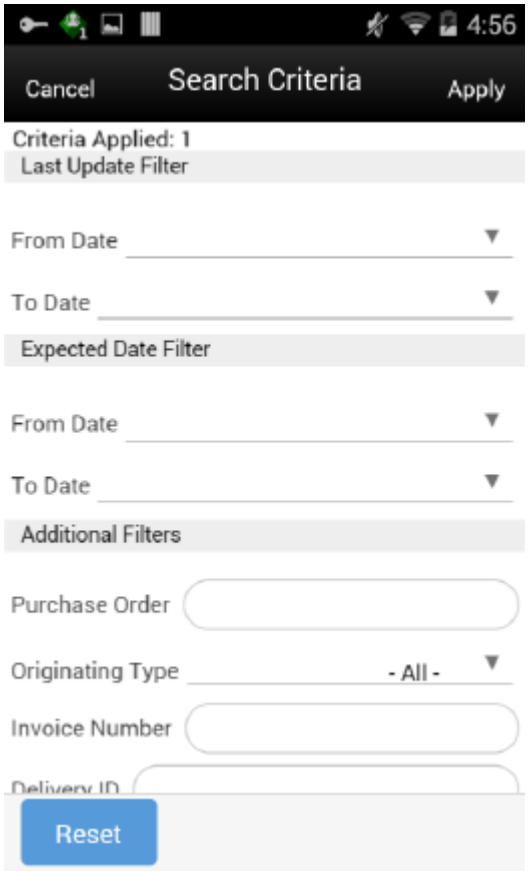
From the DSD Receiving List window, you can do the following:

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- Select the search criteria option which is shown with the pair of eye glasses to filter the list based on the given criteria. Selecting the search criteria option takes you to the Search Criteria screen which is described below.
- Select **Create Receipt** from the footer menu to create a delivery without any PO (on the fly). Upon selecting this option, you go to the DSD Receiving Containers screen.
- Select the delivery from the list and perform detailed receiving or edit the delivery. Upon selecting the delivery record from the list, takes you to the DSD Receiving Containers screen to access the existing delivery.

DSD Receiving List Search Criteria

Figure 6-3 DSD Receiving List Search Criteria Screen



The DSD Receiving List Search Criteria screen is accessed by selecting the search criteria option with the pair of eye glasses from the DSD Receiving List screen (DSD Rcv List). By default, the DSD Receiving List screen lists the active deliveries; you can use this screen to search for deliveries on various other criteria. After applying the filter, you are returned to the DSD Receiving List screen with the deliveries displayed based on the entered criteria. You are able to filter on DSD Receipts that are for customer orders as well as search for receipts that are for a specific customer order or fulfillment orders. DSDs can also be searched based on Fiscal Doc ID/E-way Bill ID.

The originating type includes ASN, On the Fly, DEX/Nex and PO.

Select the **Include Item Packs** check box which is enabled only if the item is entered, to search for deliveries that include the pack item of the entered item.

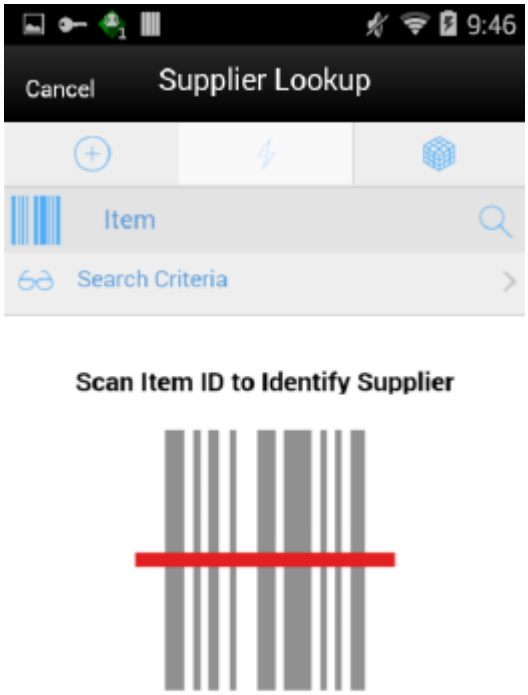
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Use the **Reset** button on this screen to reset all the filtering criteria to default values.

Creating a New DSD Receipt

You can create a new direct delivery on the fly without any ASN or PO by selecting **Create Receipt** from the DSD Receiving List screen. The system displays the Supplier Lookup screen to search the supplier. Select to create the delivery.

Figure 6-4 Supplier Lookup



This Supplier Lookup screen appears when **Create Receipt** is selected on the DSD Receiving List screen to create an on the fly receipt that does not have a PO in the system.

You can identify the supplier by entering or scanning the item id or select the search criteria option to filter the supplier based on the entered criteria.

Based on the item id or on the values entered in the search criteria, the supplier(s) are listed and allowed to select a supplier who delivered.

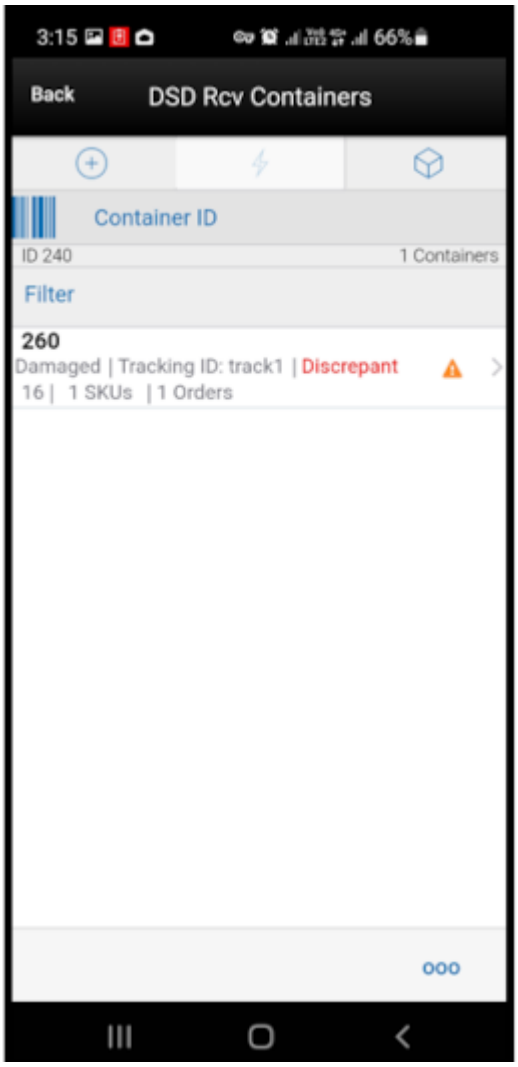
After selecting the supplier, the system takes you to the DSD Receiving Containers screen to create new containers and to perform detailed item level receiving.

The selected supplier must be allowed to Create New Purchase Orders or the Ignore the Supplier DSD indicator to create a PO on the fly parameter has to be set to **Yes** to receive a delivery without a PO from that supplier.

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DSD Receiving Containers

Figure 6-5 DSD Receiving Containers



You can see the DSD Receiving Containers (DSD Rcv Containers) screen for all type of deliveries. It appears under the following conditions:

- When you select the delivery from the DSD Receiving List screen
- When you select **Create Receipt** from the Purchase Order Items screen
- After selecting the supplier, when you select **Create Receipt** from the DSD Receiving List to create an on the fly delivery

If you are receiving a delivery with an ASN type of delivery, it shows the containers. Select the container to go to the Container Items screen to do the detailed item level receiving. You can also create a new container using **Create Container** which takes you to the Container Items screen to receive unexpected containers or when adding a container for a delivery without ASN.

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The **Create** option is only available if you have permission for the New and In-progress deliveries.

You can also optionally scan or enter the container id to do the detailed item level receiving for that container.

Tap on the filter field and perform text based searches on the containers to refine the search on what is listed.

The list will be empty with zero containers initially, in case you are creating a new receipt without a PO or with a PO and no ASN. Select **Create Container** in that case to start the receiving process.

On this screen, you can also perform other operations by selecting the respective option from the footer menu which can be accessed by selecting the ellipsis (…) from the lower right hand corner of the screen.

Footer Menu

Create: This menu is same as Create button to create a new container.

Info: Select the info option to view the invoice particulars and delivery related information. See DSD Receiving Container Info.

Edit Receipt: This menu option allows you to enter the receipt information such as carrier and invoice details. When selected navigates to the Edit Receipt screen. This menu option is available only for the deliveries in New or In-Progress status.

Edit CFAs: This menu option allows you to capture values for the CFAs that are set up based on the type of delivery such as On the Fly, PO and PO and ASN. See Edit CFAs.

Default Qty: The default quantity option will help you to default the remaining expected quantity to the received quantity in the containers. The system will not default the quantities for the items that are processed earlier and contains a value including zero. This button is not enabled for the On the Fly delivery. You can perform this process from this menu for all the containers in the current delivery with the New and In-Progress status. For specific containers, go into the detail, that is, Container Items screen.

- If the delivery is flagged for quality control, you cannot default the quantity and would be prompted with a message.
- Default Qty sets the status of the integrated UINs to In Receiving for the delivery.
- In addition, a validation check is performed to ensure the expected quantity matches the serial numbers for items, if that is not the case, you will not be allowed to receive all. If there are no UINs available for a UIN required item, the quantity is set to zero.

Confirm: Upon selecting this option, the system will confirm the delivery. The status of the container is moved to Received or Damaged or Missing or Submitted.

- If all the items in the container are zero received, the status of the container is updated to Missing.

  See Delivery Rejections and Supplier Discrepancy Check section for more details.

Print: Upon selecting this menu, the system opens the print dialog to print the report.

Reject: Select the Reject menu if the delivery has to be rejected. This will reject the delivery and move all the containers to canceled status and move the status of the delivery to Rejected. Rejection of a delivery is possible only for the deliveries that are in In-Progress or New status and it will not allow rejecting if there are any received or damaged containers in the delivery. This will also remove any UINs present in the delivery.

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Delete: Select the Delete menu if the delivery has to be deleted. This will cancel the delivery and all the containers inside the delivery.

Customer Orders: Select this menu to view the customer orders associated to the delivery. See Customer Orders.

Ext. Adjustments: Select this menu to view any adjustments done by the external system for the delivery. See External Receiver Adjustments.

Notes: Use this option to access the Notes dialog to enter any notes for the delivery.

Back: Acts similar to the back button which returns you to the previous screen.

List header fields on this screen are as follows:

Field	Description
Receipt ID	Unique ID generated internally by the system.
X Containers	X is the number of active containers currently shown on the list.

Detail fields on this screen are as follows:

Field	Description
ID	Unique container ID created by the system internally.
Status	Current status of the container. • Valid values shown are: New, In-Progress, Missing, Damaged, Submitted and Received. • The following icon's will display next to the container based on the container status: – Green Circle with Check mark - Container is in a Received or Submitted status. – Orange Triangle with Exclamation point - Container is in a Damaged status. – Red Circle with Exclamation point - Container is in a Missing status.
Discrepant	For containers in statuses 'Received' or 'Damaged', if they are 'discrepant', a label called 'Discrepant' will be displayed in red color if the received quantity does not match the expected.
Customer Order	The DSD Receiving Containers has a customer order field at the container line level to indicate if the container is for a customer order. If all items in the container are for a customer order, it will be displayed as 'CO'. If no items in the container are for a customer order, it will be blank. Lastly, if some items are for a customer order and some are not, it will be shown as 'CO Mix.'
Container ID	Container ID that came in ASN from the external vendor system.
Number(X) of SKUs	Number of SKUs present in the container.
Number(X) of Orders	Total number of purchase orders the container is associated to.
Tracking ID	Tracking Id displayed if available.

Delivery Rejections and Supplier Discrepancy Check

The system performs the discrepancy check based on the supplier level Supplier Delivery Exception Attribute. The attribute can indicate to:

- Allow Any Discrepancy
- Do Not Allow Any Discrepancies

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- Allow Overages But Not Short Receipts

Discrepancy checking only happens for those deliveries that have an expected quantity; this includes DSD deliveries for PO deliveries with or without ASN. Deliveries on the fly do not check for any discrepancies.

Discrepancy checking is done at the container level against the expected quantity. For an ASN, this would be the expected quantity of the container, while for a delivery on the fly against an existing PO, it is the remaining quantity of the PO.

You can override the discrepancy check at the container level based on the Override supplier discrepancies security permission. Once a container is moved to Submitted or Received, no additional validation is performed.

Depending on the type of DSD, some containers will move to Submitted and require the whole delivery to be confirmed, while others will move to a Received status. The reason for this is transactional integrity.

With an ASN, the received container can move to a Received status, which indicates that the Stock on Hand is updated and the merchandising system is notified that the container is received. The transaction will automatically move to Confirmed status when all containers are received.

PO on the fly and DEX/Nex do not update inventory until the delivery is confirmed, hence the containers move to a Submitted state. At that time, the delivery transaction is confirmed, the merchandizing system is notified of the whole delivery, inventory is updated and the submitted containers move to Received status.

PO deliveries without an ASN fall into a unique case. If there is a discrepancy check performed, the container will move to Submitted and require the delivery to be completed for any updates and integration. If on the other hand, the supplier does not require a discrepancy check or the supplier allows overage and it is a short receipt that is overridden, the container will be moved to a Received state, the Stock on Hand will be updated, and the merchandizing system will be notified when it is confirmed. Manual closure of the delivery transaction is required in all cases because additional containers may need to be added.

The following table describes the state the container moves into or when you are stopped when confirming a container.

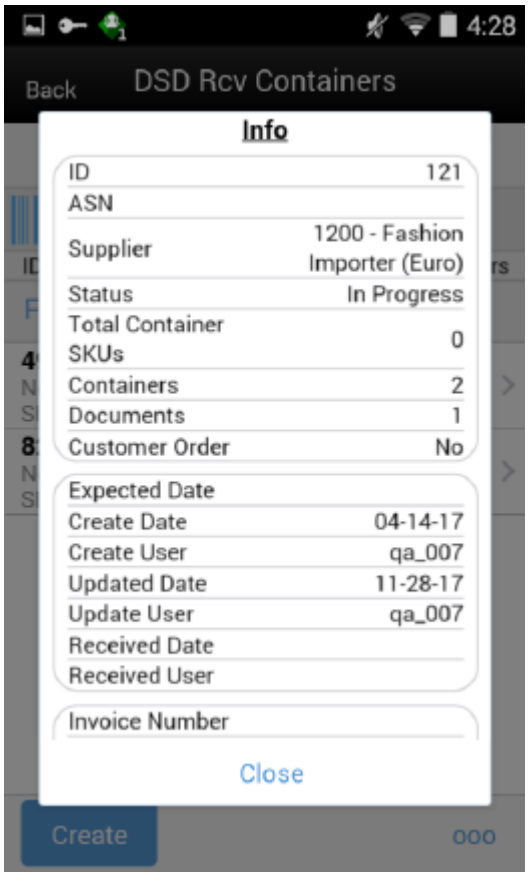
Table 6-1 Container States

Delivery Type	On the Fly/DEX/Nex	Without ASN	With ASN
Discrepancy check on carton confirm	No	Yes	Yes
Supplier Restricted, carton confirm status	Submitted	Submitted	Received
Supplier Restricted and No override discrepancy allowed	Submitted	Hard Stop	Hard Stop
Supplier Restricted and override discrepancy allowed	Submitted	Confirm Prompt Submitted	Confirm Prompt Received
Supplier Allow Overage, No override allowed and carton has short receiving	Submitted	Hard Stop	Hard Stop
Supplier Allow Overage, override allowed and carton has short receiving	Submitted	Confirm Prompt Received	Confirm Prompt Received

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DSD Receiving Info

Figure 6-6 Receiving Info Screen



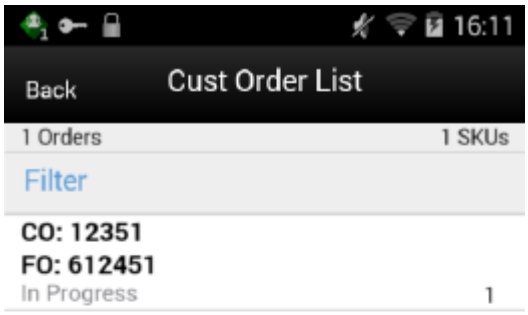
This screen is accessed from the DSD Receiving Containers screen when you select the **Info** option from the footer menu.

This screen provides the read only information such as ID which is internally created in the system, ASN, supplier, number of containers, status, create date, expected date, invoice particulars, carrier particulars, user details, custom flexible attributes if any, and so on. It may also include a field called 'Fiscal Doc ID'. This field would be a placeholder for the government reference ID/E-way Bill ID for the delivery, if available.

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Customer Orders

Figure 6-7 Customer Orders Screen

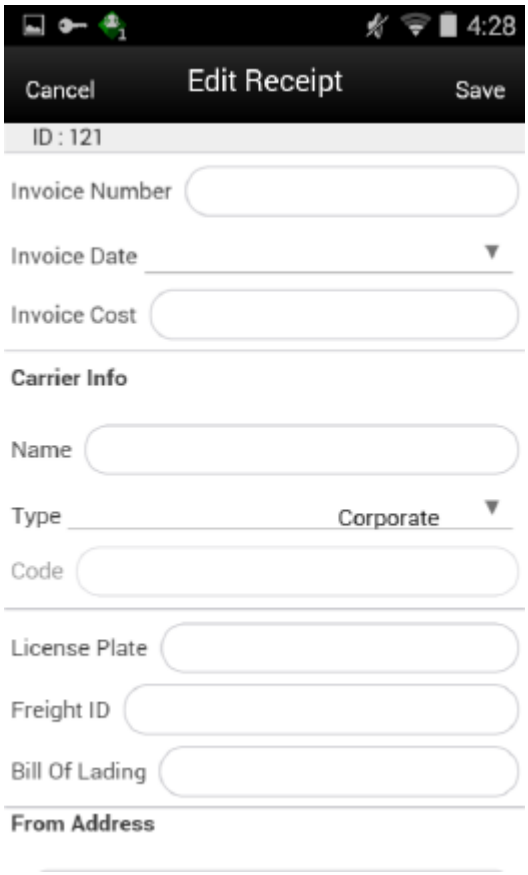


This screen appears when you select the **Customer Orders** footer menu option from the DSD Receiving Containers screen. It will display the customer order and fulfillment order IDs, along with the container ID, status, total number of orders and total SKUs. If there are no customer orders associated, it will display an error upon selecting the option. This menu option is available only for ASN and PO based deliveries regardless of delivery status and not for on the fly deliveries.

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Edit Receipt

Figure 6-8 Edit Receipt



This screen is used to capture the invoice and carrier particulars of the delivery.

This screen is accessed by selecting **Edit Receipt** from the footer menu on DSD Receiving Containers screen by selecting the ellipsis (…) on the right hand side lower corner.

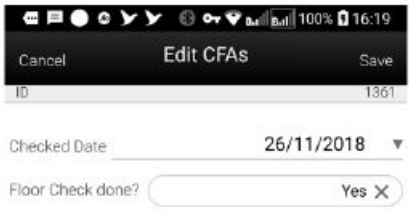
Field	Description
Invoice Number	This field is to capture the supplier invoice number of the delivery received. This field will display depending on the configuration.
Invoice Date	To capture the invoice date. This field will display depending on the configuration.
Invoice Cost	This field is used to enter the invoice cost. This field will display depending on the configuration.
Carrier Info	
Name	This field holds the name of the carrier that delivers the products. This is a text entry field.
Type	This field holds the type of carrier, whether it is Corporate or Third Party. This is a drop-down list.

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Field	Description
Code	This field holds the Standard Carrier Alpha Code if the carrier type is Third Party. This field is only available when Third Party is selected. This is a text field.
License Plate	This field holds the license plate from the Carrier's delivery vehicle. This is a text field.
From Address	This field holds the address where the delivery came from. This field is only available when Third Party is selected. This is a text field.
Freight ID	This field holds the industry standard freight codes. This is a text field.
Bill of Lading	This field holds the bill of lading identification number and will default if included on the ASN. This is a text field.

Edit CFAs

Figure 6-9 Edit CFAs



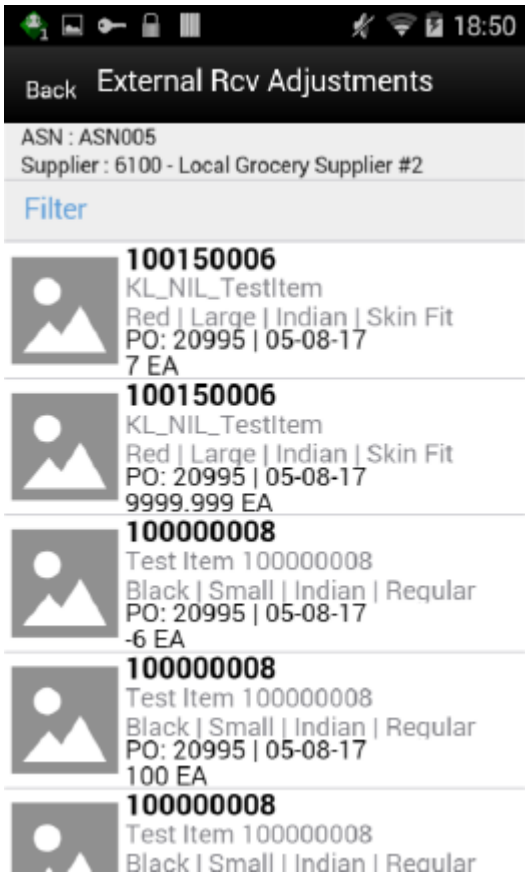
The Edit CFAs screen displays the list of CFAs (custom flexible attributes) that have been set up for the DSD -On the Fly, DSD -PO, DSD PO & ASN and DSD Container in the system and allows you enter values for them.

The CFAs need to be configured for the each type of delivery and the container for the container items. The system displays the fields based on the setup for the type of delivery. The CFAs that are set up as 'Required' must have a value entered for it before confirming. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed and the transaction must be in editable status for entering CFA values.

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External Receiver Adjustments

Figure 6-10 External Rcv Adjustments Screen

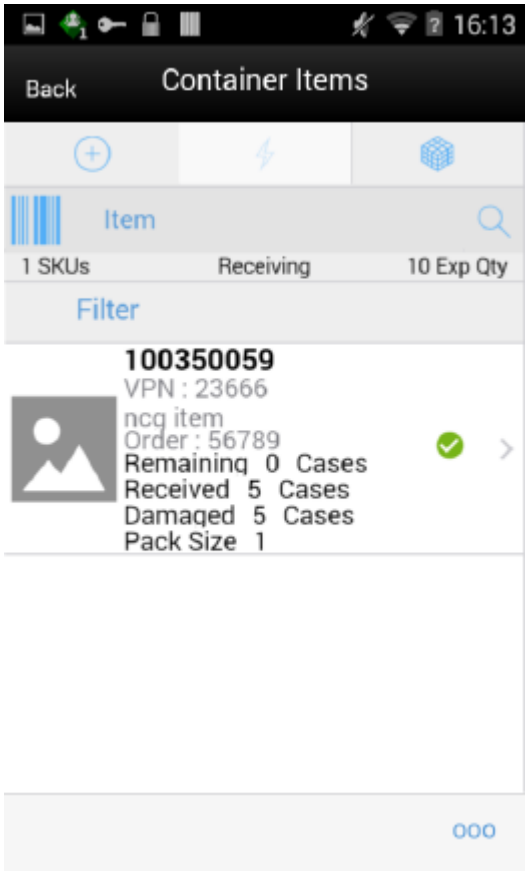


You can access this screen from the DSD Receiving Containers screen by selecting the **Ext. Adjustments** footer menu option. This read-only screen displays the ASN and supplier information at the header level and at detail level it displays Purchase Order Number, Date, Item, Description, adjusted quantity and its UOM for the external receiver adjustments that exists for the delivery. You can only access this screen when there are any adjustments created for the delivery from the external system. Store users internally adjusted deliveries in the system are not shown here.

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Container Items

Figure 6-11 Container Items Screen



This screen is accessed when you select **Create Container** or selecting an existing container on the DSD Receiving Containers screen. This is the screen for detailed item level receiving irrespective of the type of deliveries.

You must have proper permissions assigned to access this screen for both creating a new container and editing an existing container.

This screen displays the list of items that are in the container and details for a container on an ASN, or on the fly delivery. All this information is initially from the supplier ASN with the exception of the received and damaged cases. For a new based delivery, the items from the container are pre-loaded on the container items screen from the source. You can add items to the container if permissions are granted for over receiving and adding items. The user will navigate to the **Item Detail** screen for the item scanned. If the item scanned is a UIN item, the user will navigate to the UIN tab within the **Item Detail** screen.

For ASN based deliveries, if the item added exists in more than one purchase order and if you have not set any PO for receiving, the system prompts you to select the PO to assign to the item. Use the **Select Purchase Order** screen by tapping the info bar or **Select PO** footer menu option to select the PO and add items from that PO.

For a new container created for the on the fly delivery/DEX/Nex, enter/scan the items to receive.

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If the user scans a VPN, a validation is done to verify that the VPN scanned belongs to the supplier associated to the delivery.

For a new container created for a PO based but no ASN, use the **Select Purchase Order** screen by tapping the info bar or **Select PO** from the footer menu and add the items and also populate the remaining quantity optionally.

On this screen, you can also perform other operations by selecting the respective option from the footer menu which can be accessed by selecting the ellipsis (…) from the lower right hand corner of the screen.

Footer Menu

Info: Select this option to access the DSD Receiving Info screen to capture the container information.

Notes: Use this option to enter any notes for the delivery.

Default Regular Qty: Default the expected quantity to the received quantity field. This menu option is only available when the container is in New or In-Progress status and you have the proper permissions.

- If the expected quantity is zero (in the case of adding an unexpected item), the received quantity is updated to zero.
- If the delivery is flagged for quality control, you cannot default the quantity.

Select PO: Select the Purchase Order for an ASN based delivery.

Clear Qty: Clears the received quantity and damaged quantity fields for all items. This menu option is only available when the container is in New or In-Progress status.

Damage Mode: Scan/enter items and update the Damage Qty field. Once selected, the list header bar is updated to 'Damages' and any item entered or scanned will update the damages quantity. This menu option is only available when all of the following conditions are met:

1. The Container status is New or In-Progress.
2. This menu option will display when you are in Regular Mode.
3. You have the proper permissions.

Regular Mode: This menu option will allow you to switch to scan/enter items and update the Received Qty field. Once selected, the list header bar is updated to 'Receiving' and any item entered or scanned will update the receiving quantity. This menu option will only display when all of the following conditions are met:

1. The Container status is New or In-Progress.
2. When the screen is set to Receiving Damages.

Edit Container: Used to enter container information.

Adjust: This option on the **DSD Receiving Container Items** screen allows the received container to be reopened for receiving. The system allows you to add items, delete items, modify the quantity, save, or confirm the delivery. All options are available as if the container was never received.

- The period at which you are allowed to adjust the deliveries from the time the receipt is confirmed is based on the parameter and also you should also have security permissions to adjust the container. Once the container is moved back to In-Progress, you can work on it as if it was never received.

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- It is not allowed to move a container back to In-Progress if UINs that were in the container have been processed in another transaction.

Edit CFAs: This menu option allows you to capture values for the CFAs that are set up for the DSD container.

Damage Remaining Qty: This menu option will allow you to update the Damaged Qty for all items in the container where Expected - Received Qty is greater than zero.

- If you have not received any items in the container, all items in the container are marked as damaged.
- If you have received some items and the Expected - Received Qty is greater than zero, the Damaged Qty field is updated with the remaining quantity.
- This menu option is only available when the container status is in New or In-Progress.

Display Only Discrepancies: This menu option will allow you to display only items with a Received + Damaged Qty which does not equal the expected quantity.

- This menu option is only available when the screen is in a 'Display All Items' mode.
- The discrepancy check will apply to all items, even those with an expected quantity of zero. When an item is added to a container the Expected Qty will be zero. The unexpected items will always be discrepant.

Display All Items: This menu option will allow you to reset to display all items after selecting to **Display Only Discrepancies**. This menu option is not available for on the fly deliveries.

Confirm: Used to confirm the container. See Delivery Rejections and Supplier Discrepancy Check for additional information.

Save: Saves the container with current changes.

Delete: Deletes the container.

Back: Used to return to the previous screen.

Cancel: Used to cancel any changes and go back to the **Containers** screen.

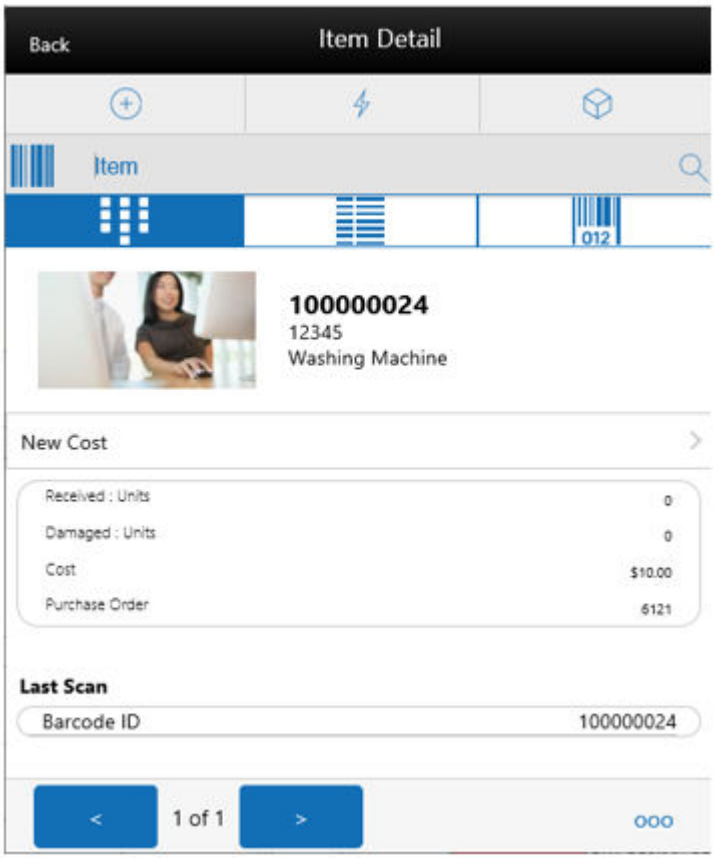
Print: Opens the print dialog to print the report.

Print Tickets: Opens the Print Tickets dialog to print the tickets or labels for the current container items. This is described in common usage document with more details.

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Receiving Item Detail

Figure 6-12 Item Detail Screen



The **Item Detail** screen is accessed from the Container Items screen when scanning an item that is already in the container or adding a new item to the container.

Scanning or entering an item on this screen in the scan bar updates the quantity per the scan mode and refreshes the **Item Detail** screen for the item and quantity scanned. If the item scanned is a UIN item, the user will directly navigate to the UIN tab within the Item Detail screen.

If the user scans a VPN, a validation is done to verify that the VPN scanned belongs to the supplier associated to the delivery.

You can edit the received or damaged quantity if it is in edit mode and if you have permissions.

The item header portion displays the item information including the image if configured to show. The bottom portion which is detail allows you to edit the quantities if the state of the container allows and you have permissions. The system displays the following fields on the bottom portion.

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Field	Description
Received	This field shows the UOM based on the UOM mode. The value on this field is the received quantity. When this is editable, you can enter the quantity via a popup. User needs permissions to edit the quantity
Damaged	This field shows the UOM based on the UOM mode. The value on this field is the damaged quantity. When this is editable, you can enter the quantity via a popup. User needs permissions to edit the quantity.
Pack Size	This is the pack size of the item. This field is editable.
New Cost	This field is populated with the item supplier cost in case of on the fly deliveries. This field is displayed and editable for on the fly. You can enter the cost of the item at which the item is received from the supplier. This field is displayed only if it is configured to show. In general, if a PO was created by the merchandizing system, the system does not allow the store user to edit the cost as it was defined by the external system. It will also not communicate any cost information to the merchandising system. If the delivery is on the fly, the system will use the cost based on item supplier country information. It is possible with the right permissions to edit this cost and the cost can be communicated to the external system
Original Cost	This field is a read only field and only for PO and ASN based deliveries
Purchase Order	PO assigned to the current item.
Expected	Expected quantity to be delivered from the ASN/PO.
Remaining	Balance quantity to be delivered in the order.
Last Scan	The details of the last scanned barcode.

You can navigate through the existing items on the container using the two arrows on the bottom. In between the arrows the system displays the current item number position out of the total number of items.

Perform further operations by selecting the respective footer menu options.

1. **Damage Mode** - This menu option will allow you to scan/enter items and update the Damage Qty.
   - The value selected will update any item entered or scanned after changing.
   - The receiving mode will stay the same until it is changed by selecting the footer menu again.
   - When you navigate to this screen from the Container Items screen, the receiving mode will be the same on this screen.
   - If the user changes the Receiving mode from this screen and navigates to the Container Items screen, the receiving mode will also be changed on the Container Items screen.
   - The user will remain on this screen.
2. **Regular Mode** - This menu option will allow the user to scan/enter items and update the Received Qty.
   - The value selected will update any item entered, scanned or tapped after changing.

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- The receiving mode will stay the same until it is changed by selecting the footer menu again.
- When the user navigates to this screen from the Container Items screen, the receiving mode will be the same on this screen.
- If the user changes the Receiving mode from this screen and navigates to the Container Items screen, the receiving mode will also be changed on the Container Items screen.
- The user will remain on this screen.

The UIN tab on this screen is to take the user to the UIN screen to add/remove UINs for UIN items (if UIN processing is enabled and if the item is a UIN item).

When you enter the screen for the first time, the Status will display the following:

1. The UINs included on an incoming ASN will be displayed with a status of **Shipped to Store**.
2. The UINs manually added will be displayed with a status of **Unconfirmed**, if they do not previously exist.
3. The UINs manually added may have another status, if they already exist in the system.
   - When you re-enters this tab, the status will be updated to **In Receiving**.
   - When the transaction is no longer editable, the screen will be in view only mode.
4. You will not have the ability to change the Receiving Mode for the UIN.
   - For the ASN based delivery, any UINs present in the ASN will be ignored if the UIN type for the item is AGSN.
   - The Extended Attributes tab enables the user to view/capture Extended Attributes for the item. If the item is not configured to capture extended attributes or there are no extended attributes captured, the list will be empty.

Over Receiving Validations

When receiving a direct delivery, the user must have the proper permission to be able to over receive. The validation occurs as the item is scanned and the quantity is updated or when the quantity is manually updated. The permissions are:

1. **Allow ASN Over Receiving** - when receiving against an ASN, the system will check if the received quantity is greater than the expected quantity (ASN quantity).
   a. If the user does not have this permission, the user will be given an error and must update the quantity.
   b. If the user does have this permission, then there will be no error and it is permitted to have a received quantity greater than the ASN.
2. **Allow PO Over Receiving** - when receiving against a Purchase Order with OR without an ASN, the system will check if the received quantity is greater than the expected quantity (PO remaining quantity).
   a. If the user does not have this permission, the user will be given an error and must update the quantity.
   b. If the user does have this permission, then there will be no error and it is permitted to have a received quantity greater than the PO remaining quantity.

Assuming the user has proper permission to over receive (as stated above). When receiving the user will be able to receive more than the expected quantity (ASN quantity / PO Remaining

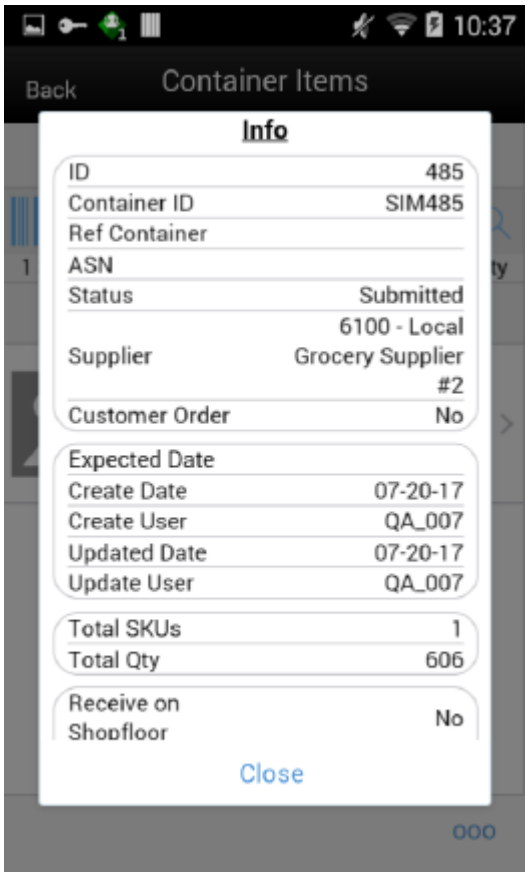
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quantity) during the receiving process. Once confirming the container, the system will remove the over received quantities. There are two store configurations that are used:

1. **Direct Delivery Auto Remove Over Received Quantity** - at confirmation of the container any quantity received over the expected quantity will result in a prompt to the user and the overages will be removed by the system.
2. **Direct Delivery Auto Remove Damaged Quantity** - at confirmation of the container any damaged quantity received will result in a prompt to the user and all damaged quantities will be removed by the system.

DSD Receiving Container Info

Figure 6-13 DSD Receiving Container Info Screen



This screen is accessed from the Container Items screen when you select the **Info** option from the footer menu. This is a read-only screen and provides the following information about the container.

Field	Description
ID	Unique container ID created by the system internally.
Container ID	Container ID that came in ASN from the external vendor system.
Reference Container	This field is used to identify a misdirected container.
ASN	Advance shipment number of this delivery.

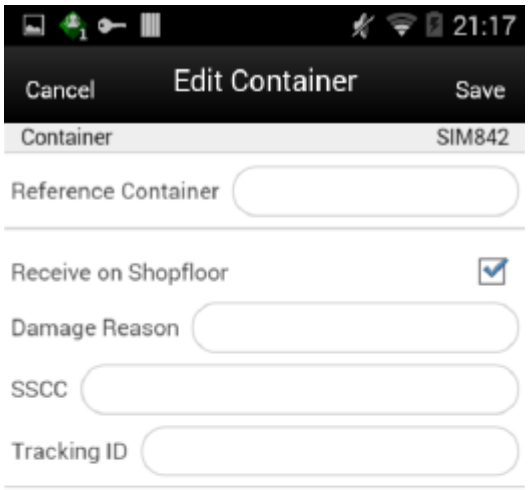
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Field	Description
Status	Current status of the container
Supplier	This field shows the supplier id and the name of the supplier who delivered.
Customer Order	This indicates whether customer is associated. If a customer order is associated with all the items in the container, it will display <Yes> and if the container contains items with and without customer associated, it will display <Mix>. If there is no CO, it will display <No
Expected Date	Original expected date of the delivery.
Create Date	Date of creation of the container in the system.
Create User	User who created the container.
Updated Date	The date on which the container was last update.
Updated User	Person who updated the container last.
Received Date	The date on which the container was received. Shown only after if it is received.
Received User	Person who received the container. Shown only if it is received.
Total SKUs	Total number of items.
Ordered Qty	This field displays the total remaining ordered quantity. This appears only for the PO based delivery.
Expected Qty	This field displays the total expected quantity. Unlike the Container Items screen at the individual item level this is not depending on the permission. This appears only for ASN based delivery.
Total Qty	This field displays the total received quantity including the damaged.
Receive on Shop floor <Yes/No>	This field displays Yes or No, to indicate whether the receiving happens at the shop floor.
Damage Reason	This field displays the damage reason if captured.
SSCC	This field displays the GS1 barcode container id if one is entered on the DSD Receiving Edit Container screen.
Tracking ID	This field displays the tracking id assigned to the container if one is entered on the DSD Receiving Edit Container screen.
CFAs	This screen will show the CFAs captured.

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Edit Container

Figure 6-14 Edit Container Screen



This screen is for you to capture the container information such as reference container, to indicate whether the container is received at shop floor, damage reason, SSCC and Tracking Id of the container.

This screen is accessed by selecting the **Edit Container** option from the footer menu on Containers Items screen by selecting the ellipsis (…) on the right hand side lower corner.

You have to complete the following fields that are enabled and then **Save** to return to the Container Items screen:

Reference Container: This field is to capture a reference to a container that was not intended for the current location.

Receive on Shop Floor: The default will be based on the store parameter **Direct Delivery Default to Shop floor Receiving**. If set to **Yes**, the check box will default to marked.

You are required to have **Receive Direct Delivery on Shop floor** permissions to change the value.

This indicates whether the delivery will default to receive inventory into the shop floor instead of automatically receiving into the back room or delivery bay.

If this is set to receive on shop floor, the system increments the shop floor inventory bucket instead of the backroom or delivery bay bucket. If a capacity is defined for the item and **Direct**

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Delivery Receive Item Capacity is set to **Yes**, the maximum shop floor quantity will equal the capacity; otherwise, the shop floor will be updated to the entire receipt amount. If the capacity is used and if the receiving quantity is excess, the balance is incremented to delivery bay or back room depending on the Replenishment - Delivery Bay Inventory parameter.

If receive on shop floor is not set on the delivery, the system increments the back room or delivery bay bucket depending on the Replenishment - Delivery Bay Inventory parameter. If this parameter is on, the system will increment the delivery bay bucket instead of back room. This will increase Stock On Hand as well.

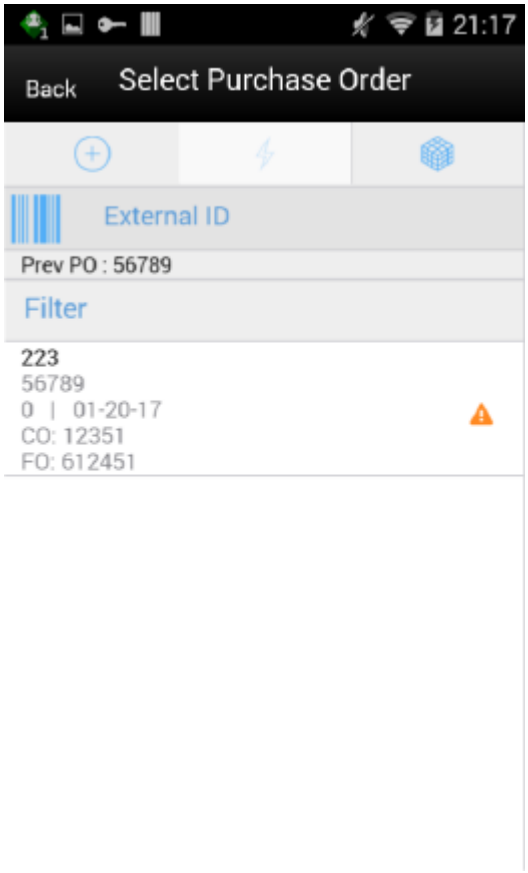
Damage Reason: Identifies the reason for damage on the container, when items in the container have been damaged during transport. This field is optional.

SSCC: This field allows you to identify a GS1 bar code used with the container. There is no validation on this field and it is optional. This is the full 18 digit number.

Tracking ID: This field allows you to type in a tracking id from the delivery service. This is a text field and is not validated. This is an optional field used to track information only.

Selecting a Purchase Order for a PO Based Delivery

Figure 6-15 Select Purchase Order Screen



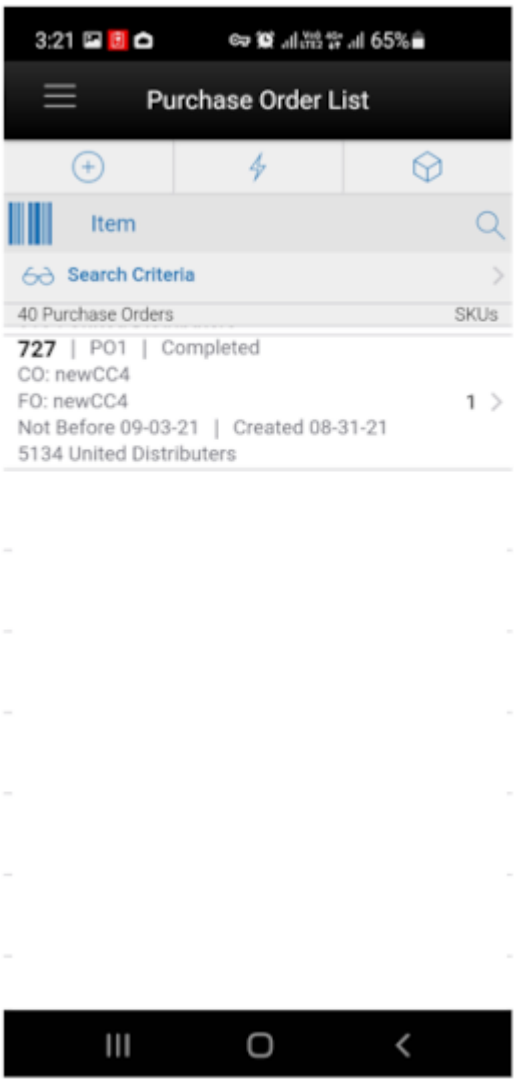
This screen can be reached through the Container Items screen by tapping the document bar or by selecting **Select PO** in the footer menu. This screen will show the purchase orders and, when you select the purchase order, you are prompted with a popup with the following options.

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- **Use Purchase Order**: This menu option will set the PO document referenced in the container to the user selection. Any items added will be updated to the selected document.
  1. There will be validation to see if the item exists on the PO document, but the items are not automatically added to the container.
  2. This will be the option by default selected.
- **Apply Item(s)**: This menu option will add all items from the selected PO document to the container without applying the remaining quantity to the received quantity and the system will default the received quantity to zero.
- **Add Item(s) & Remaining Qty**: This menu option will add all items along with their corresponding remaining quantity to the received quantity in the container.

Purchase Order List

Figure 6-16 Purchase Order List Screen



This screen is accessed when you select **Purchase Order** from the Shipping / Receiving drawer menu.

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The Purchase Order List is a screen that allows you to view purchase orders placed to the suppliers to supply goods for your store. The default is to display the list of all active status that is, Approved and In-Progress purchase orders. Use the search criteria screen to filter out the records.

This screen provides the following header level information about the Purchase Order including the ID which is system internally generated, External ID, Supplier, Not Before Date if available, Create date of the PO, current status of the PO, total number of SKUs, and customer order id and fulfillment order id if customer order is associated with the PO.

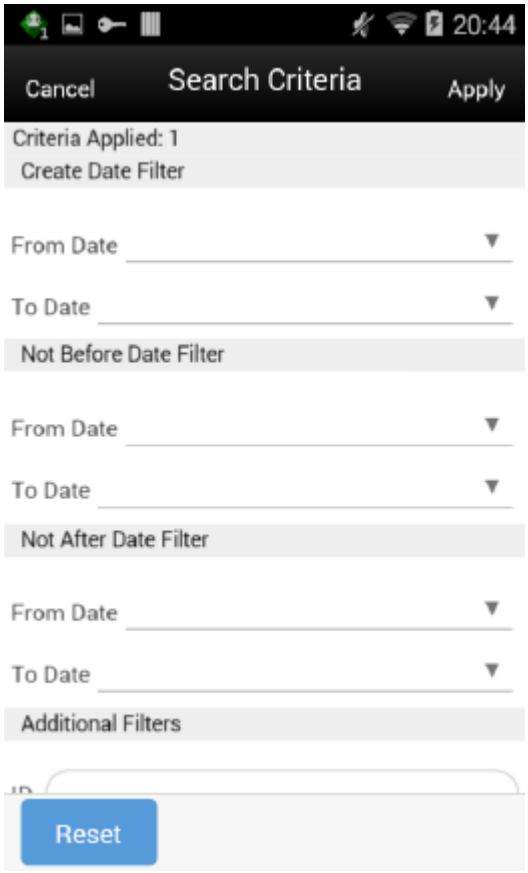
On the List header, it shows the total number of purchase orders listed.

From the Purchase Order List screen, select a purchase order to go the Purchase Order Items screen to view the item details for the PO.

Purchase orders created internally in the system for on the fly deliveries are also shown in this list.

Purchase Order List Search Criteria

Figure 6-17 Purchase Order List Search Criteria Screen

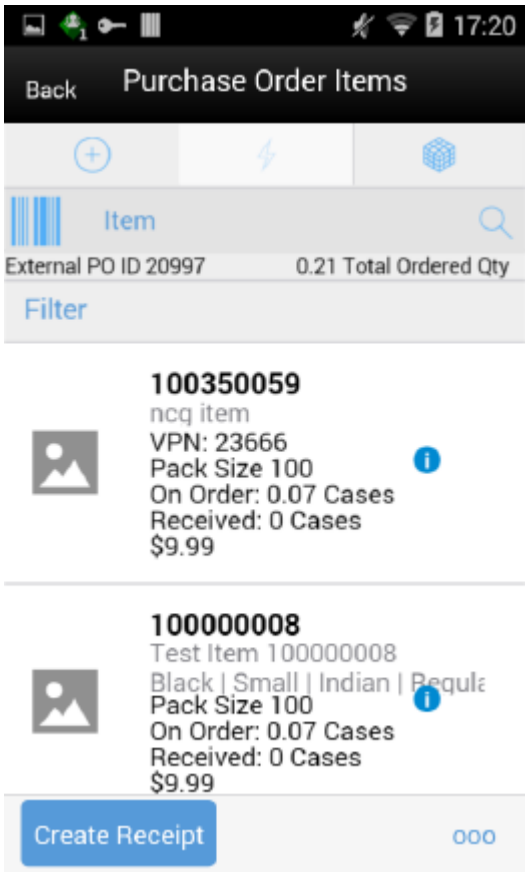


This is the Purchase Order List Search Criteria screen. It is accessed by tapping the search criteria option shown with the pair of glasses from the Purchase Order List screen. You can filter the purchase orders with a variety of search criteria. After applying the criteria, you are returned to the Purchase Order List screen with the purchase orders displayed per the entered criteria.

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Purchase Order Items

Figure 6-18 Purchase Order Items Screen



The Purchase Order Items screen is accessed when you select a purchase order record from the Purchase Order List screen.

The Purchase Order Items screen displays all of the purchase order header and item details for the selected purchase order. This screen is view-only for informational purposes.

The header contains the header information including: Supplier, system created unique Id, External Purchase Order ID, Customer Order (if applicable), Fulfillment Order (if applicable), current status of the PO, Create Date, Not before date, Not after Date, and UOM. You can select the UOM from the drop-down to view the items based on the selected UOM.

The ordered quantity is the total quantity remaining in the order for all the items, the expected quantity is the total ordered quantity in the order for all items and the received quantity is the total of how many quantities quantity received.

The detail level has the item, description, Pack Size, as well as the On Order, Expected and Received.

You can create a receipt from the Purchase Order Items screen by selecting **Create Receipt** which will navigate to the DSD Receiving Containers screen with the existing purchase order applied to the delivery. You can create container and start the receiving process as previously described.

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On this screen, you can perform other operations by selecting the respective option from the footer menu which can be accessed by selecting the ellipsis (…) from the lower right hand corner of the screen.

Footer Menu

Info: Views the PO details which includes the CFAs if available.

Print: Opens the print dialog to print the report.

Customer Order Reserve On Receipt / Auto Pick

DSD Receiving can be configured to reserve inventory for customer orders upon receiving and also to auto pick the inventory. For additional details on this process, see Customer Orders.

Direct Store Delivery JET Mobile

Overview

A direct store delivery is a delivery in which the supplier drops off merchandise directly at the store. These deliveries received directly at the store can be against a planned delivery, an existing purchase order (PO) raised by the corporation or by the store or a purchase order on the fly. The delivery supports containers coming in directly with Advance Shipment Notice (ASN), or the system will create a container when the ASN is loaded in the system. The system will also allow you to create containers for receipts without ASN . For the deliveries that are created on the fly, either with reference to the PO or without PO, the retailers can manage the delivery with containers or without containers.

The store can receive partial shipments, resulting in multiple deliveries against a single purchase order.

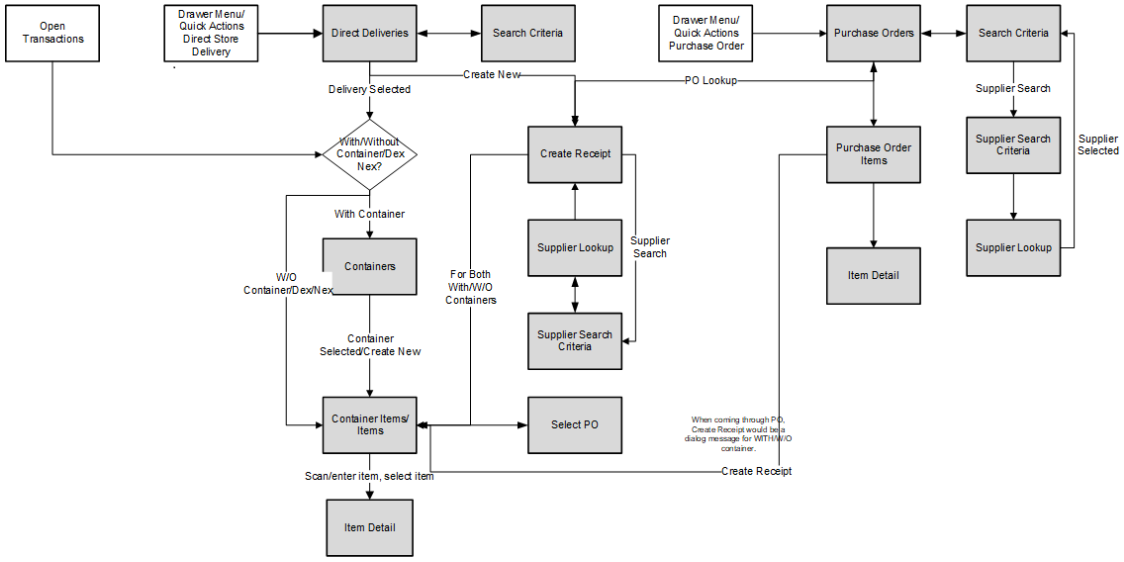
Features

- Direct deliveries against a Purchase Order (PO) and with Advance Shipment Notice (ASN) from the supplier. This feature also supports containers coming directly from the source and allows you to create additional containers.
- Receive on shop floor directly or back room/delivery bay.
- Create direct delivery receipts against a PO and without ASN from the supplier. You can receive these deliveries with or without containers. If it is with container, it supports delivery by creating one or more containers.
- Create Direct Delivery receipts without a PO with containers or without containers.
- Direct EXchange (DEX)/Nex type deliveries.
- Capture values for Custom Flexible Attributes (CFA) at the direct store delivery and containers level.

Screen Flow

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Figure 6-19 Direct Store Delivery JET Mobile Screen Flow



You can access DSD Receiving and Purchase Order options from the Shipping and Receiving menu, Open Transactions or Quick Actions menus. The Direct Deliveries screen that appears after selecting **DSD Receiving** will by default list all the active deliveries. The active deliveries include the deliveries created on the fly by the store users, ASNs that came from the suppliers and Dex-Nex based deliveries that are not yet completed.

The Create New option will take you to the Create Receipt screen, where you can provide various criteria and create an on-the-fly receipts.

At this point the user has the option to select with or without containers. If they select a delivery that is with containers, they are navigated to the Containers screen that list the containers in the delivery.

If they select a delivery that is without container, they are navigated to the Delivery Items screen.

Through the footer menu, the user has access to additional options from the Containers screen such as Delivery Info, Receipt Adjustments, Print, Notes, Default Quantity to perform various individual functions.

On the Container Items screen, they can select the footer menu for various options such as Info, Default Regular Quantity, Clear Quantities, Adjust and so on to perform various individual functions.

On the Delivery Items footer menu, they will find both the Delivery Info and Receipt Info to view the header level and the receipt level information.

In the Purchase Orders screen that appears after selecting **Purchase Order menu** , the user can view the purchase order details and create a receipt against a PO.

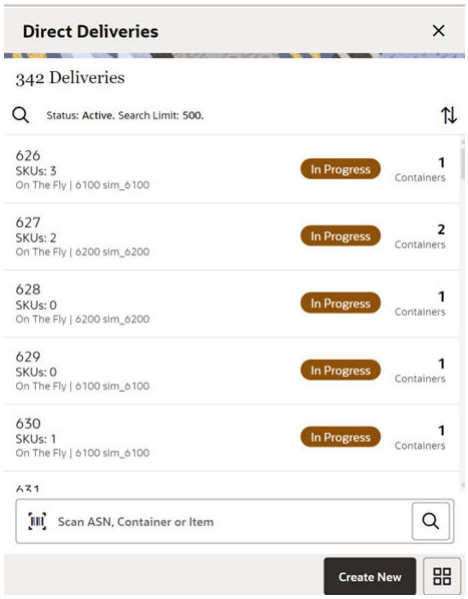
Functionality

This section describes the available screens in Direct Store Delivery for JET Mobile.

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Direct Deliveries

Figure 6-20 Direct Deliveries Screen



The Direct Deliveries screen is accessed when you select **DSD Receiving** from the Shipping and Receiving menu or Quick Actions.

The system by default shows all the active deliveries for which you can enter the detailed receiving. This includes all types of deliveries. If the supplier has sent an ASN, it is uploaded and listed here. You can select a delivery and enter the detailed receiving. If the store has received a delivery via DEX/Nex service, it will be listed here, and you can select it to enter the detailed receiving. If you have started the delivery process, it shows the delivery with In Progress status. You can select the In Progress deliveries to continue the receiving process. You can also select the completed deliveries to perform adjustments.

- The deliveries created in the mobile application are shown with the type On the Fly.
- The deliveries that have ASN from the source are shown with the type ASN.
- The deliveries that are PO based and no ASN are shown with the type of PO.
- The deliveries that are of DEX/Nex based are shown with the type DEX/Nex.
- DSD Receipts that are affiliated with a customer order will be indicated with the text 'CO' at the receipt level on this screen.

From the Direct Deliveries screen, you can do the following:

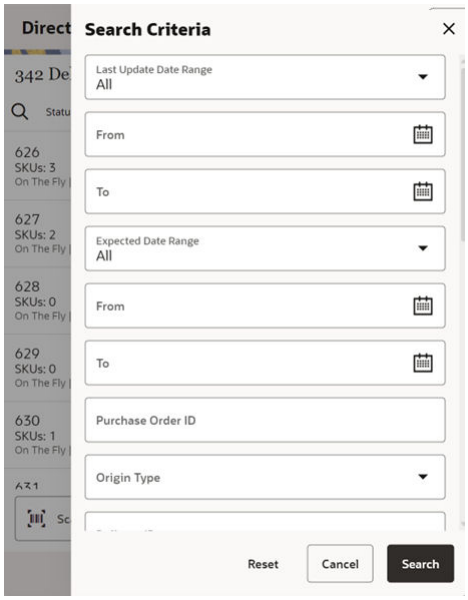
- Select the Search Criteria option, which is shown with the magnifying glass, to filter the list based on the given criteria. Selecting the Search Criteria option takes you to the Search Criteria screen, which is described in the Direct Deliveries Search Criteria topic.
- Select the **Create New** footer button to create an on-the-fly delivery. Upon selecting this option, you are taken to the Create Receipt screen to provide the details to create a receipt.

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- Select the delivery from the list and perform detailed receiving or edit the delivery. Upon selecting the delivery record from the list, the system takes you to the Containers screen if the delivery is created with containers. If no,t it takes you to the Delivery Items screen
- On this screen, you can scan and ASN ID, Container ID or Item to search a delivery .

Direct Deliveries Search Criteria

Figure 6-21 Direct Deliveries Search Criteria Screen



The Direct Deliveries Search Criteria screen is accessed by selecting the **Search Criteria** option from the Direct Deliveries screen. By default, the system lists the active deliveries. You can use this screen to search for deliveries on various other criteria. After applying the filter, you are returned to the Direct Deliveries screen with the deliveries displayed based on the entered criteria. You can filter on DSD Receipts that are for customer orders as well as search for receipts that are for a specific customer orders or fulfillment orders. DSDs can also be searched based on Fiscal Doc ID/E-way Bill ID.

The originating type includes ASN, On the Fly, DEX/Nex and PO.

Select the **Include Item Packs** switch option, which is enabled only if the item is entered, to search for deliveries that include the pack item of the entered item.

Use the **Reset** button on this screen to reset all the filtering criteria to default values.

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Creating a New DSD Receipt

Figure 6-22 Create Receipt Screen (Without Purchase Order)

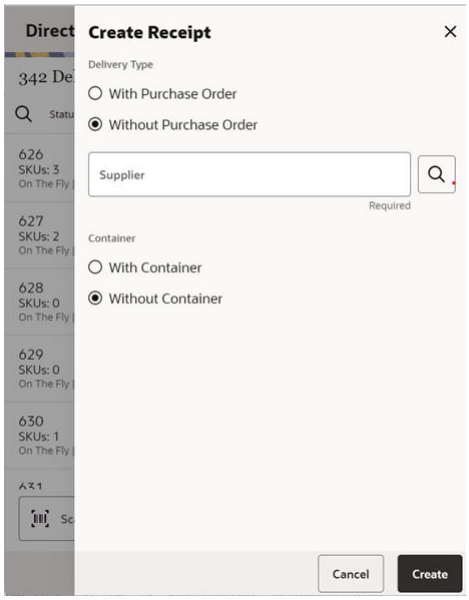
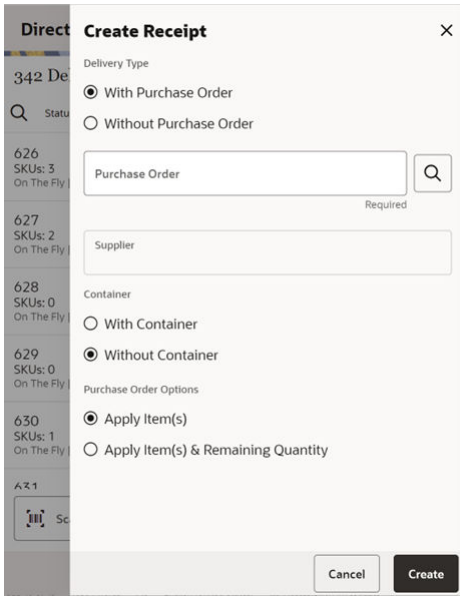


Figure 6-23 Create Receipt Screen (With Purchase Order)



You can create a new direct delivery receipt on the fly by selecting the **Create New** option on the Direct Deliveries screen.

For on-the-fly receipts without an ASN, you can create a delivery with or without a purchase order (PO). When creating a receipt, you can select whether to create the delivery with containers or without containers.

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You can use the supplier lookup to search for the supplier.

In the case of a receipt with a PO, you can searchfor the PO. Upon selecting the search option, the system will take you to the Purchase Orders screen that lists the active Purchase orders. You can refine search and select the PO to apply for the delivery.

Once you have selected the PO, you can select to apply to items or apply to items and remaining quantity.

When you apply to items alone, the system will associate the delivery and apply the items that are in the selected Purchase order by defaulting the received quantity to zero and allowing the user to override with the actual received quantity.

When you apply to items and remaining quantity, the system references the selected PO to the delivery, adds all items that have a remaining quantity >0 and populate the received quantity with the PO remaining quantity.

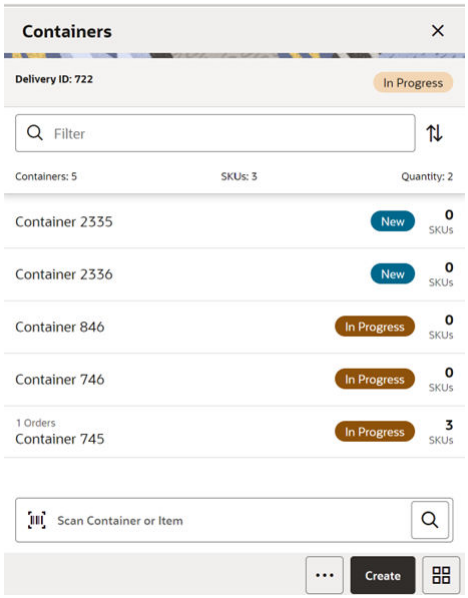
After providing all the criteria to create the delivery, if you select the **Create** option, the system creates a delivery and navigates to Delivery Items if it is without containers, or to Container Items if it is with containers.

New PO deliveries can also be created with or without container. SIOCS can be configured to provide this option to a user, have it pre-defaulted, or hide it. This allows the retailer to configure the system based on needs, since many supplier DSD deliveries on the fly happen without container delivery. Keep in mind that based on other settings like single delivery per PO, not having containers can prevent multiple users from receiving against the same PO.

> **Note**
>
> Delivery without container will still create a container in the backend, however the user will not interact directly with a container screen or have to select a container.

Containers

Figure 6-24 Containers Screen



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The Containers screen appears when you select a delivery from the Direct Deliveries screen. This screen appears only when you select a delivery that has one or more containers and is not a delivery without container.

If you are receiving a delivery with an ASN type of delivery, it shows the containers. Select the container to go to the Container Items screen to do the detailed item level receiving. You can also create a new container using **Create Container** which takes you to the Container Items screen to receive unexpected containers.

The **Create** option is only available if you have permission for the New and In-progress deliveries

You can also optionally scan or enter the container id to do the detailed item level receiving for that container.

Tap on the filter field and perform text-based searches on the containers to refine the search on what is listed.

On this screen, you can also perform other operations by selecting the respective option from the footer menu which can be accessed by selecting the ellipsis (...) from the bottom of the screen.

Footer Menu

Create: This menu is the same as Create button for creating a new container.

Info: This screen displays delivery-related information and allows you to view and invoice particulars, carrier, and CFAs. See Delivery Info for more details.

Default Quantity: The default quantity option lets you default the remaining expected quantity to the received quantity in the containers. The system will not default the quantities for the items that are processed earlier, and contains a value including zero. This option is not available for the On-the-Fly delivery. You can perform this process from this menu for all the containers in the current delivery with the New and In-Progress status. For specific containers, go into the detail,, Container Items screen.

- If the delivery is flagged for quality control, you cannot default the quantity and would be prompted with a message.
- Default Qty sets the status of the integrated UINs to'In Receiving' for the delivery.
- In addition, a validation check is performed to ensure the expected quantity matches the serial numbers for items. If that is not the case, you will not be allowed to receive all items. If there are no UINs available for a UIN required item, the quantity is set to zero.

Confirm: Upon selecting this option, the system will confirm the delivery.

- This option can be accessed if you have permission, and the delivery is in' New' or 'In Progress' status.
- When you confirm the delivery, the system performs various processes before it confirms the delivery.
- The system will first check whether there are any containers in the delivery and if there is no container, the system prompts with an error message.
- The system checks whether the receipt is empty, meaning there are no containers with received or damaged quantities. If it is an empty receipt, the system checks whether you are allowed designate it as an empty receipt, and if allowed, it confirms the delivery and puts all the containers in missing status.
- The system perforrns the validation on ASN over receiving and PO over receiving and displays an error if it meets the condition.

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- Additionally, the system checks for the supplier discrepancies. See Delivery Rejections and Supplier Discrepancy Check section for more details.

Print: Upon selecting this menu, the system opens the print dialog to print the report.

Reject: Select the Reject menu if the delivery has to be rejected. This will reject the delivery and move all the containers to canceled status and move the status of the delivery to Rejected. Rejection of a delivery is possible only for the deliveries that are in In-Progress or New status and it will not allow rejecting if there are any received or damaged containers in the delivery. This will also remove any UINs present in the delivery.

Delete: Select the Delete menu if the delivery has to be deleted. This will cancel the delivery and all the containers inside the delivery.

Receipt Adjustments: Select this menu to view any adjustments done by the external system for the delivery. See Receipt Adjustments.

Notes: Use this option to access the Notes dialog to enter any notes for the delivery.

On the title bar, you can see the Delivery ID, ASN Id if ASN based delivery and status of the delivery.

At the header level, the system displays the total number of containers, total SKUs present in the delivery and the total quantity in the delivery.

Detail fields on this screen are as follows:

Table 6-2 Detail Fields

Field	Description
ID	Unique container ID created by the system internally.
Status	Current status of the container. Valid values shown are: New, In-Progress, Missing, Damaged, Submitted and Received.
Customer Order	The DSD Receiving Containers has a customer order field at the container line level to indicate if the container is for a customer order. If all items in the container are for a customer order, it will be displayed as 'CO'. If no items in the container are for a customer order, it will be blank. Lastly, if some items are for a customer order and some are not, it will be shown as 'CO Mix.'
Container ID	Container ID that came in ASN from the external vendor system.
Number (X) of SKUs	Number of SKUs present in the container
Number (X) or Orders	Total number of purchase orders the container is associated to.
Tracking ID	Tracking Id displayed if available.

Delivery Rejections and Supplier Discrepancy Check

The system performs the discrepancy check based on the supplier level Supplier Delivery Exception Attribute. The attribute can indicate to:

- Allow Any Discrepancy
- Do Not Allow Any Discrepancies
- Allow Overages But Not Short Receipts

Discrepancy checking only happens for those deliveries that have an expected quantity; this includes DSD deliveries for PO deliveries with or without ASN. Deliveries on the fly do not check for any discrepancies.

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Discrepancy checking is done at the container level against the expected quantity. For an ASN, this would be the expected quantity of the container, while for a delivery on the fly against an existing PO, it is the remaining quantity of the PO.

You can override the discrepancy check at the container level based on the Override supplier discrepancies security permission. Once a container is moved to Submitted or Received, no additional validation is performed.

Depending on the type of DSD and supplier settings, some containers will move to Submitted and require the whole delivery to be confirmed, while others will move to a Received status. The reason for this is transactional integrity. In certain regions, a DSD is fully accepted as accurate, otherwise it can be rejected. This is controlled through a supplier flag.

With an ASN, the received container can move to a Received status, which indicates that the Stock on Hand is updated and the merchandising system is notified that the container is received. The transaction will automatically move to Confirmed status when all containers are received.

Inventory is updated when the container is confirmed or when the delivery is confirmed in case of no container receiving. When containers move to submitted, they are not added to inventory yet, which will happen when all containers are submitted. When SIOCS inventory is updated, the merchandise system is also notified of the receipt, be it a container or an entire delivery.

PO deliveries without an ASN fall into a unique case. If there is a discrepancy check performed, the container will move to Submitted and require the delivery to be completed for any updates and integration. If on the other hand, the supplier does not require a discrepancy check or the supplier allows overage and it is a short receipt that is overridden, the container will be moved to a Received state, the Stock on Hand will be updated, and the merchandizing system will be notified when it is confirmed. Manual closure of the delivery transaction is required in all cases because additional containers may need to be added.

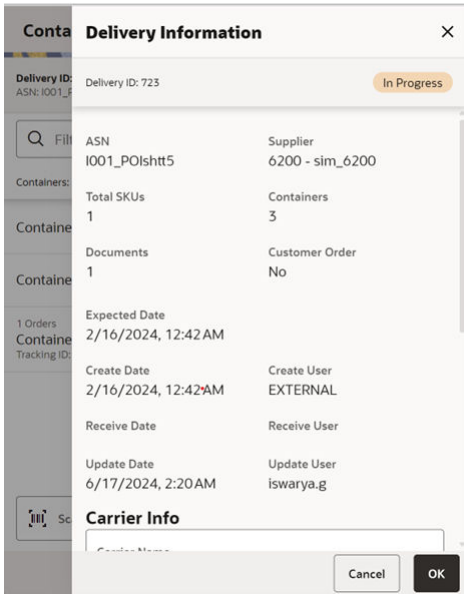
The following table describes the state the container moves into or when you are stopped when confirming a container.

Delivery Type	On the Fly/Dex/Nex	Without ASN	With ASN
Discrepancy check on carton confirm	No	Yes	Yes
Supplier Restricted, carton confirm status	Submitted	Submitted	Received
Supplier Restricted and No override discrepancy allowed	Submitted	Hard Stop	Hard Stop
Supplier Restricted and override discrepancy allowed	Submitted	Confirm Prompt Submitted	Confirm Prompt Received
Supplier Allow Overage, No override allowed and carton has short receiving	Submitted	Hard Stop	Hard Stop
Supplier Allow Overage, override allowed and carton has short receiving	Submitted	Confirm Prompt Received	Confirm Prompt Received

Delivery Info

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Figure 6-25 Delivery Info Screen



This screen is accessed from the Containers screen when you select the **Info** option from the footer menu.

This screen provides the delivery information and allows you to capture the invoice particulars, carrier details, license plate details and custom flexible attributes if any.

On this screen, you can find information such as Delivery ID, which is internally created in the system, ASN, supplier, number of containers, status, create date, expected date, captured invoice particulars, carrier particulars, license plate, user details, custom flexible attributes if any, and so on. It may also include a field called 'Fiscal Doc ID'. This field would be a placeholder for the government reference ID/E-way Bill ID for the delivery, if available.

If the delivery is associated to any customer order, you can select the View Details link on the customer order field which will take you to the Customer Orders screen to view the details.

The table below defines the fields that are relevant to invoice and carrier particulars of the delivery.

Table 6-3 Delivery Info Fields

Field	Description
Invoice Number	The supplier invoice number of the delivery received. This field will display depending on the configuration.
Invoice Date	The invoice date. This field will display depending on the configuration
Invoice Cost	This field is used to enter the invoice cost. This field will display depending on the configuration. It is only for information purpose and not integrated.
Carrier Info	
Name	The name of the carrier that delivers the products. This is a text entry field.
Type	The type of carrier, Corporate or Third Party. This is a drop-down list.

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Table 6-3 (Cont.) Delivery Info Fields

Code	The Standard Carrier Alpha Code if the carrier type is Third Party. This field is only available when Third Party is selected. This is a text field.
License Plate	The license plate from the Carrier's delivery vehicle. This is a text field.
From Address	The address from which the delivery originated. This field is only available when Third Party is selected. This is a text field
Freight ID	The industry standard freight codes. This is a text field.
Bill of Lading	This field holds the bill of lading identification number and will default if included on the ASN. This is a text field.

This screen displays the list of CFAs (custom flexible attributes) that have been set up for the DSD -On the Fly, DSD -PO, DSD PO & ASN and DSD Container in the system The user can enter values for them here.

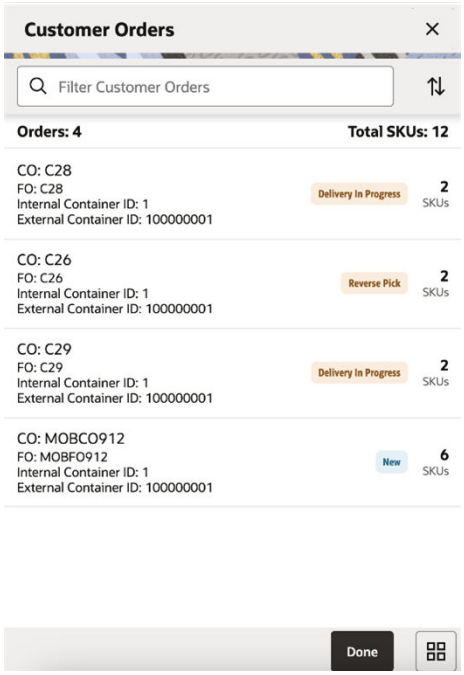
CFAs must be configured for each type of delivery, and the container for the container items. The system displays the fields based on the setup for the type of delivery. The CFAs that are set up as 'Required' must have a value entered before confirming the delivery or container (if configured at that level). The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs while creating them in the desktop application. Appropriate security permission is needed, and the transaction must be in editable status for entering CFA values.

> **Note**
>
> For the CFAs that are mandatory, the validation does not happen on this screen. It validates only at the time of confirmation, and the user is directed to this screen again to capture the information.

Customer Orders

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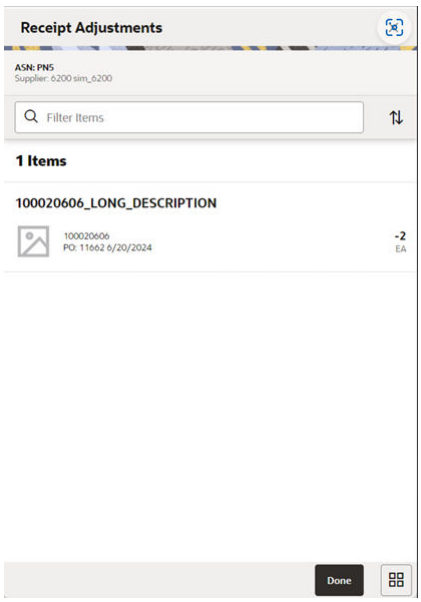
Figure 6-26 Customer Orders Screen



This screen appears when you select the View Details on the customer order field from the Delivery/Receipt and Container Information screens. It will display the customer order and fulfillment order IDs, along with the container ID, status, total number of orders and total SKUs. This screen is available only for ASN and PO based deliveries regardless of delivery status and not for on-the-fly deliveries.

Receipt Adjustments

Figure 6-27 Receipt Adjustments Screen

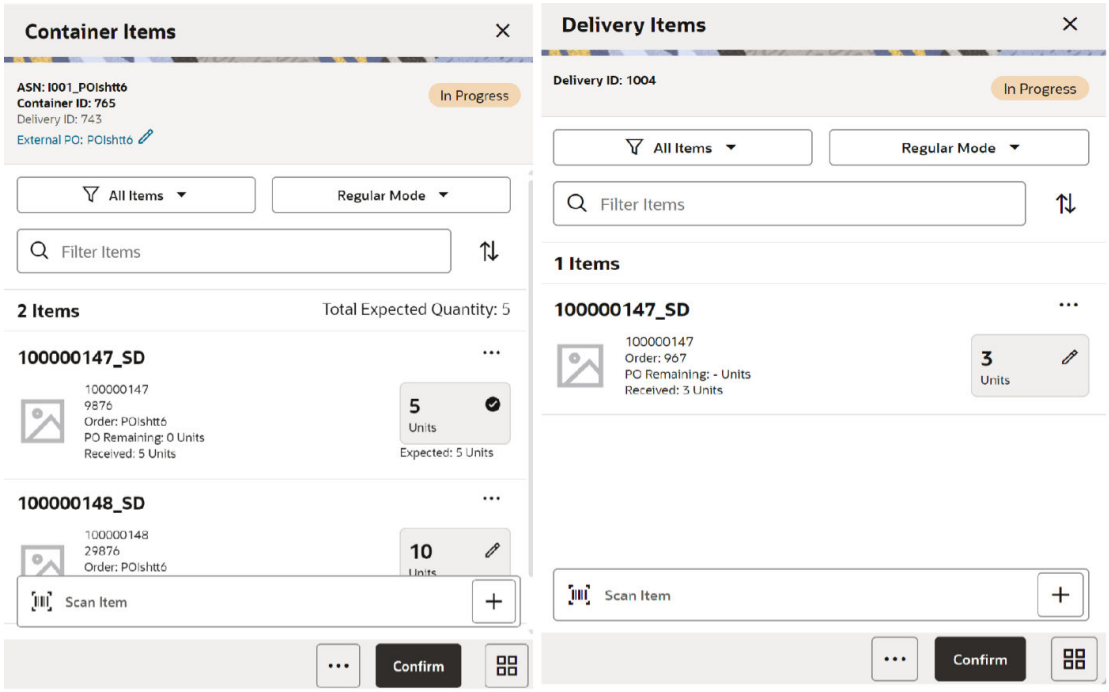


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You can access this screen from the Containers screen by selecting the Receipt Adjustments footer menu option. This read-only screen displays the ASN and supplier information at the header level and at detail level it displays Purchase Order Number, Date, Item, Description, adjusted quantity and its UOM for the external receiver adjustments that exists for the delivery. You can only access this screen when there are any adjustments created for the delivery from the external system. Store users internally adjusted deliveries in the system are not shown here.

Container/Delivery Items

Figure 6-28 Container/Delivery Items Screen



This section describes the two screens that provide a list of items: Container Items and Delivery Items. For an ASN based delivery, container(s) will always be available, while for DSDs against PO or on the fly, a container could be optional.

You can navigate to this screen in multiple ways:

- When you select a container from the Containers screen.
- When you create a receipt using the Create Receipt screen.
- When you create a new container from the Containers screen.
- When a transaction is selected from the Open Transactions screen and it is without a container.

You must have proper permissions assigned to access this screen for both creating a new container and editing an existing container.

For an ASN based delivery, the items from the container are pre-loaded on the Container Items screen from the source. You can add items to the container if permissions are granted for over receiving and adding items. The user can l navigate to the **Item Detail** screen for the item

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scanned. If the item scanned is a UIN item, the user can navigate to the UIN screen within the **Item Detail** screen.

For ASN based deliveries, the user will need to select a PO when adding an unexpected item. Use the **Select Purchase Order** screen by tapping the External PO pencil to select the PO and add items from that PO.

If the user scans a VPN, a validation is done to verify that the VPN scanned belongs to the supplier associated to the delivery.

Users can edit the quantity of the items from this screen by selecting the pencil icon or + in case of UIN items at the item level. Quantity will also be updated by the barcode qty upon entering the item or scanning the item.

If the item level quantity panel indicates a tick mark, it means the item is fully received and you will not find the pencil icon, but you can still edit the item.

On this screen, you can also perform other operations by selecting the respective option from the footer menu which can be accessed by selecting the ellipsis (...) from the bottom of the screen.

You can filter the items displayed by selecting the filter display option (drop down). The system will show the selected display option and allow you to edit the option. When you select the field, the system displays a pop up to select the option. By default, the system will show all items. The system will refresh the <X> Items field based on the filter option selected. You are allowed to filter based on the below options:

All Items

- Upon selecting this option, the system will reset any other option selected and display all the items in the container.

Damaged

- Upon selecting this option, the system will filter and show only the items having damaged quantity. The list will include items containing received quantity, and discrepant items if applicable

Discrepant

- Not available for on-the-fly type deliveries.
- Upon selecting this option, the system will filter items and show only the items that are discrepant.
- Discrepant items are determined when the Received + Damaged Quantity is not equal to the expected quantity of the item in the container.
- The discrepancy check will apply to all items, even those with an expected quantity of zero. When an item is added to a container the Expected Qty will have a zero. The unexpected items will always be discrepant.
- If there are no discrepancies to display, the system will display an error message and no changes on the screen

Received

- Upon selecting this option, the system will filter items and show only that have received quantity and no damaged. The list will include discrepant items if applicable.

Not Received

- Upon selecting this option, the system will filter items and show only that are not received. (Both Received and Damage Quantity is null).

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Receiving Mode — Receiving mode is displayed on the header to indicate whether the user is Receiving good units or Damaged units. You can change the mode by selecting the drop down which will take you to a popup to select the mode of receiving. The system sets the Receiving mode to Receiving by default when the user gets into the Container items/ Delivery Items screen.

Damage Mode — This menu option will allow you to scan/enter items and update the Damage Qty field.

When this is selected, any item entered or scanned will update the damages quantity

This menu option is only available when all of the following conditions are met:

- The Container status is New or In Progress.
- The user is in Regular Mode.
- The user has the Allow Receiving Damages permission.

You will remain on this screen after selecting this mode.

Regular Mode — This menu option will allow the user to switch to scan/enter items and update the Received Qty field.

This menu option will only display when all the following conditions are met:

- The Container status is New or In Progress.
- When the screen is set to Receiving Damages.
- The user is required to have the Allow Receiving Damages permission to see this menu option. (Since this option is used to switch between recording damages and regular receiving, if the user is not able to record damages, this menu option would not be applicable and should never be made available.)

The Receiving Mode remains when navigating between the Container Items/Items and Item Details screens until the user changes the option.

Regular Mode is the default mode when the user enters the Container Items Screen.

Receiving Mode resets to the default, Regular mode, whenever the user enters the Container Items Screen.

You will remain on this screen after selecting Regular mode.

Footer Menu

Info: You will find this option only for Container Items. Select this option to access the Information screen to capture the container information.

Delivery Info : You will find this option to display the header level information for the non-container based deliveries. This is same as described above in the Delivery Info.

Receipt Info: You will find this option to display the receipt level which is same as container level information for the non-container-based deliveries. This is same as described in the container information section.

Notes: Use this option to enter any notes for the delivery.

Default Regular Qty: Default the expected quantity to the received quantity field. This menu option is only available in New or In-Progress status and you have the proper permissions.

- If the expected quantity is zero (in the case of adding an unexpected item), the received quantity is updated to zero.

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- If the delivery is flagged for quality control, you cannot default the quantity.

Clear Qty: Clears the received quantity and damaged quantity fields for all items. This menu option is only available in New or In-Progress status.

Adjust: This option allows the received container or delivery (without container) to be reopened for receiving. The system allows you to add items, delete items, modify the quantity, save, or confirm the delivery. All options are available as if the container was never received.

- The period at which you are allowed to adjust the deliveries from the time the receipt is confirmed is based on the parameter and you should also have security permissions to adjust the container. Once the container is moved back to In-Progress, you can work on it as if it was never received.
- It is not allowed to move a container or delivery without container back to In-Progress if UINs were received.

Damage Remaining Qty: This menu option will allow you to update the Damaged Qty for all items where Expected - Received Qty is greater than zero.

- If you have not received any items, all items are marked as damaged.
- If you have received some items and the Expected - Received Qty is greater than zero, the Damaged Qty field is updated with the remaining quantity.
- This menu option is only available when the container status is New or In-Progress.

Confirm: Used to confirm the container or delivery. Upon selecting the confirmation, the system validates before confirming and prompts the user with warnings or validation issues.

In case of a no container delivery, the system checks whether the delivery is empty without having any items with either received or damaged quantity. You need proper permission to confirm the empty receipt. Essentially it will complete the entire delivery, so the same type of checks and validation are performed as for a receipt with containers.

If the delivery is PO based, the system validates supplier discrepancies.

If the delivery is PO based but without ASN, the system validates the PO over receiving.

The system checks whether the shop floor receiving setting for the inventory will be at the shop floor, or back room.

Save: Saves the container with current changes.

Save and Exit : This option will save any changes made to the delivery and exit the screen. This is available only for Delivery Items.

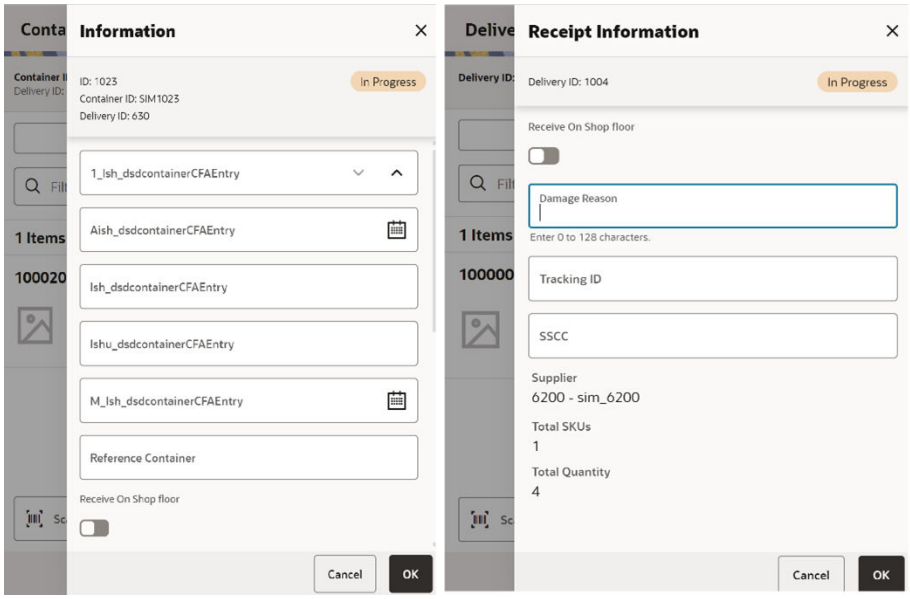
Cancel: Used to cancel any changes and go back to the **Containers** screen.

Print: Opens the print dialog to print the report.

Container Info

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Figure 6-29 Information/Receipt Information Screen



This screen is accessed from the Container Items/Delivery Items screen when you select the **Info/Receipt Info** option from the footer menu. This screen displays and captures the receipt/container information.

This screen lets you capture container/receipt information, such as reference container, whether the container is received at shop floor, damage reason ,and SSCC and Tracking Id of the container.

Reference Container: This field captures a reference to a container that was not intended for the current location.

Receive on Shop Floor: The default will be based on the store parameter **Direct Delivery Default to Shop floor Receiving**. If set to **Yes**, the switch will be set to receive at shop floor.

You are required to have **Receive Direct Delivery on Shop floor** permissions to change the value. This indicates whether the delivery will default to receive inventory on the shop floor instead of automatically receiving into the back room or delivery bay.

If this is set to receive on the shop floor, the system increments the shop floor inventory bucket instead of the backroom or delivery bay bucket. If a capacity is defined for the item and **Direct Delivery Receive Item Capacity** is set to **Yes**, the maximum shop floor quantity will equal the capacity; otherwise, the shop floor will be updated to the entire receipt amount. If the capacity is used and if the receiving quantity is excess, the balance is incremented to the delivery bay or back room depending on the Replenishment - Delivery Bay Inventory parameter.

If receiving on the shop floor is not set on the delivery, the system increments the back room or delivery bay bucket depending on the Replenishment - Delivery Bay Inventory parameter. If this parameter is on, the system will increment the delivery bay bucket instead of back room. This will increase Stock On Hand as well.

Damage Reason: Identifies the reason for damage on the container, when items in the container have been damaged during transport. This field is optional.

SSCC: This field allows you to identify a GS1 bar code used with the container. There is no validation on this field and it is optional. This is the full 18 digit number.

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Tracking ID: This field allows you to type in a tracking id from the delivery service. This is a text field and is not validated. This is an optional field used to track information only.

This screen additionally displays the list of CFAs (custom flexible attributes) that have been set up for the DSD -On the Fly, DSD -PO, DSD PO & ASN and DSD Container in the system and allows you enter values for them.

The CFAs must be configured for the each type of delivery and the container for the container items. The system displays the fields based on the setup for the type of delivery. The CFAs that are set up as 'Required' must have a value entered for it before confirming. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed and the transaction must be in editable status for entering CFA values.

The following table defines the fields displayed:

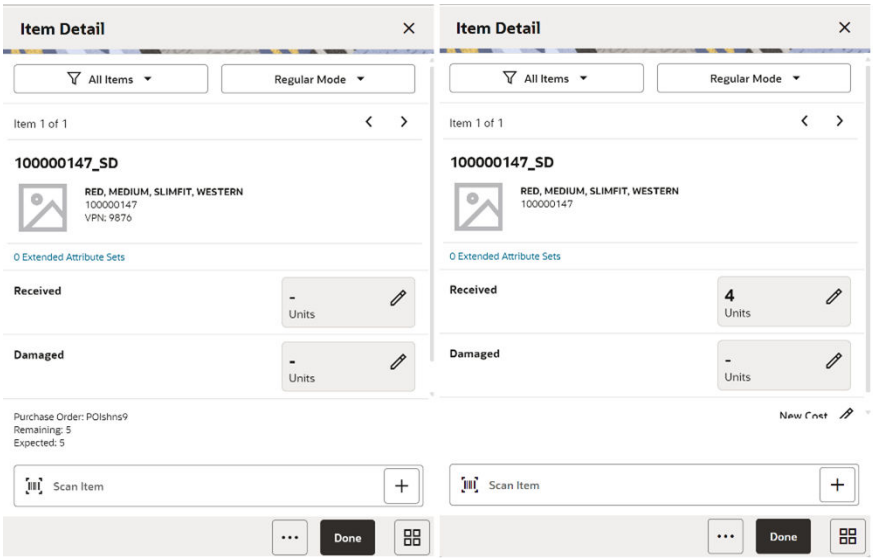
Table 6-4 Information/Receipt Information Fields

Field	Description
ID	Unique container ID created by the system internally.
Container ID	Container ID that came in ASN from the external vendor system.
Reference Container	This field is used to identify an ad hoc container.
ASN	Advance shipment number of this delivery.
Status	Current status of the container
Supplier	The supplier id and the name of the supplier who delivered.
Customer Order	This indicates whether customer is associated. If a customer order is associated with all the items in the container, it will display <Yes> and if the container contains items with and without customer associated, it will display <MIX>. If there is no CO, it will display <NO>
Expected Date	Original expected date of the delivery.
Create Date	Date of creation of the container in the system.
Create User	User who created the container.
Updated Date	The date on which the container was last updated.
Updated User	Person who updated the container last.
Received Date	The date on which the container was received. Shown only after if it is received.
Received User	Person who received the container. Shown only if it is received.
Total SKUs	Total number of items.
Ordered Qty	This field displays the total remaining ordered quantity. This appears only for the PO based delivery
Expected Quantity	This field displays the total expected quantity. Unlike the Container Items screen at the individual item level, this does not depend on the permission. This appears only for ASN based delivery.
Total Quantity	This field displays the total received quantity including damaged quantity.

Receiving Item Detail

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Figure 6-30 Item Detail Screen



The **Item Detail** screen is accessed from the Container Items/Delivery Items screen when scanning an item that is already in the container or adding a new item to the container.

Scanning or entering an item on this screen in the scan bar updates the quantity per the scan mode and refreshes the **Item Detail** screen for the item and quantity scanned. If the item scanned is a UIN item, the user will directly navigate to the UIN tab within the Item Detail screen.

If the user scans a VPN, a validation is done to verify that the VPN scanned belongs to the supplier associated to the delivery.

You can edit the received or damaged quantity if it is in Edit mode and if you have permissions.

The system displays the item information including the image and allows you to capture the quantity.

The table below defines the item Detail fields:

Field	Description
Received	This field shows the UOM based on the UOM mode. The value on this field is the received quantity. When this is editable, you can enter the quantity via a popup. The user needs permissions to edit the quantity.
Damaged	This field shows the UOM based on the UOM mode. The value on this field is the damaged quantity. When this is editable, you can enter the quantity via a popup. The user needs permissions to edit the quantity.
Pack Size	This is the pack size of the item. This field is editable.

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New Cost	This field is populated with the item supplier cost in case of on the fly deliveries. This field is displayed and editable on the fly. You can enter the cost of the item that is received from the supplier. This field is displayed only if it is configured to do so. In general, if a PO was created by the merchandising system, the system does not allow the store user to edit the cos,t as it was defined by the external system. It will also not communicate any cost information to the merchandising system. If the delivery is on the fly, the system will use the cost based on item supplier country information. It is possible with the right permissions to edit this cost and the cost can be communicated to the external system.
Original Cost	This is a read only field and only for PO and ASN based deliveries.
Purchase Order	PO assigned to the current item.
Expected	Expected quantity to be delivered from the ASN/PO.
Remaining	Balance quantity to be delivered in the order.
Last Scan	The details of the last scanned barcode.

You can navigate through the existing items on the container using the two arrows on the top. On the top the system displays the current item number position out of the total number of items.

You can filter the items displayed by selecting the filter display option (drop down). The system will show the selected display option and allow you to edit the option. When you select the field, the system displays a pop up for selectingt the option. By default, the system will show all items. You are allowed to filter based on the options below:

All Items

- Upon selecting this option, the system will reset any other option selected and display all the items in the container.

Damaged

- Upon selecting this option, the system will filter and show only the items having damaged quantity. The list will include items containing received quantity, and discrepant items if applicable

Discrepant

- Not available for on-the-fly type deliveries.
- Upon selecting this option, the system will filter items and show only the items that are discrepant.
- Discrepant items are determined when the Received + Damaged Quantity is not equal to the expected quantity of the item in the container.
- The discrepancy check will apply to all items, even those with an expected quantity of zero. When an item is added to a container the Expected Qty will be zero. The unexpected items will always be discrepant.
- If there are no discrepancies to display, the system will display an error message and no changes on the screen

Received

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- Upon selecting this option, the system will filter items and show only those that have received quantity and no damaged items. The list will include discrepant items if applicable.

Not Received

- Upon selecting this option, the system will filter items and show only those that are not received. (Both Received and Damage Quantity is null).

Receiving Mode — Receiving mode is displayed on the header to indicate whether the user is Receiving good units or Damaged units. You can change the mode by selecting the drop down, which will take you to a popup to select the mode of receiving. The system sets the Receiving mode to Receiving by default when the user gets into the Container items/ Delivery Items screen.

Damage Mode — This menu option will allow you to scan/enter items and update the Damage Qty field.

When this is selected, any item entered or scanned will update the damages quantity

This menu option is only available when all of the following conditions are met:

- The Container status is New or In Progress.
- The user is in Regular Mode.
- The user has the Allow Receiving Damages permission.

You will remain on this screen after selecting this mode.

Regular Mode — This menu option will allow the user to switch to scan/enter items and update the Received Qty field.

This menu option will only display when all the following conditions are met:

- The Container status is New or In Progress.
- When the screen is set to Receiving Damages.
- The user is required to have the Allow Receiving Damages permission to see this menu option. (Since this option is used to switch between recording damages and regular receiving, if the user is not able to record damages, this menu option would not be applicable and should never be made available.)

The Receiving Mode remains when navigating between the Container Items/Items and Item Details screens until the user changes the option.

Regular Mode is the default mode when the user enters the Container Items Screen.

Receiving Mode resets to the default, Regular mode, whenever the user enters the Container Items Screen.

You will remain on this screen after selecting Regular mode.

Over Receiving Validations

When receiving a direct delivery, the user must have the proper permission to be able to over receive. The validation occurs as the item is scanned and the quantity is updated or when the quantity is manually updated. The permissions are:

Allow ASN Over Receiving - When receiving against an ASN, the system will check if the received quantity is greater than the expected quantity (ASN quantity).

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- f the user does not have this permission, the user will be given an error and must update the quantity.
- If the user does have this permission, then there will be no error and it is permitted to have a received quantity greater than the ASN.

Allow PO Over Receiving - When receiving against a Purchase Order with OR without an ASN, the system will check if the received quantity is greater than the expected quantity (PO remaining quantity).

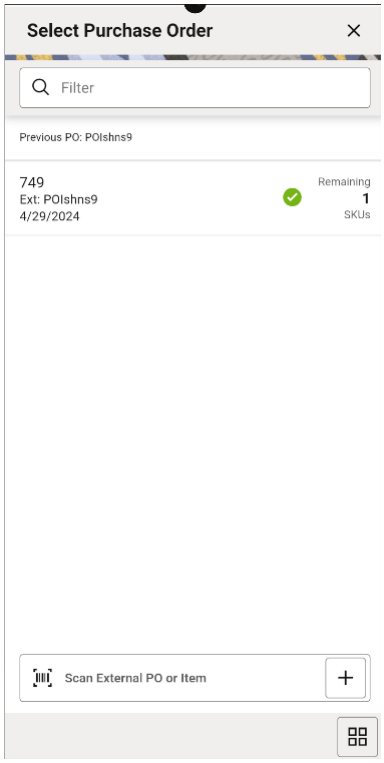
- If the user does not have this permission, the user will be given an error and must update the quantity.
- If the user does have this permission, then there will be no error and it is permitted to have a received quantity greater than the PO remaining quantity.

Assuming the user has proper permission to over receive (as stated above), they will be able to receive more than the expected quantity (ASN quantity / PO Remaining quantity) during the receiving process. Once the container is confirmed, the system will remove the over received quantities. There are two store configurations that are used:

- **Direct Delivery Auto Remove Over Received Quantity** - At confirmation of the container, any quantity received over the expected quantity will result in a prompt to the user and the overages will be removed by the system.
- **Direct Delivery Auto Remove Damaged Quantity** - At confirmation of the container, any damaged quantity received will result in a prompt to the user and all damaged quantities will be removed by the system.

Selecting a Purchase Order for a PO Based Delivery

Figure 6-31 Select Purchase Order Screen



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This screen can be reached through the Container Items screen by selecting the external PO pencil icon. This screen will show the purchase orders and, when you select the purchase order, you are prompted with a popup with the following options:

Use Purchase Order: This menu option will set the PO document referenced in the container to the user selection. Any items added will be updated to the selected document

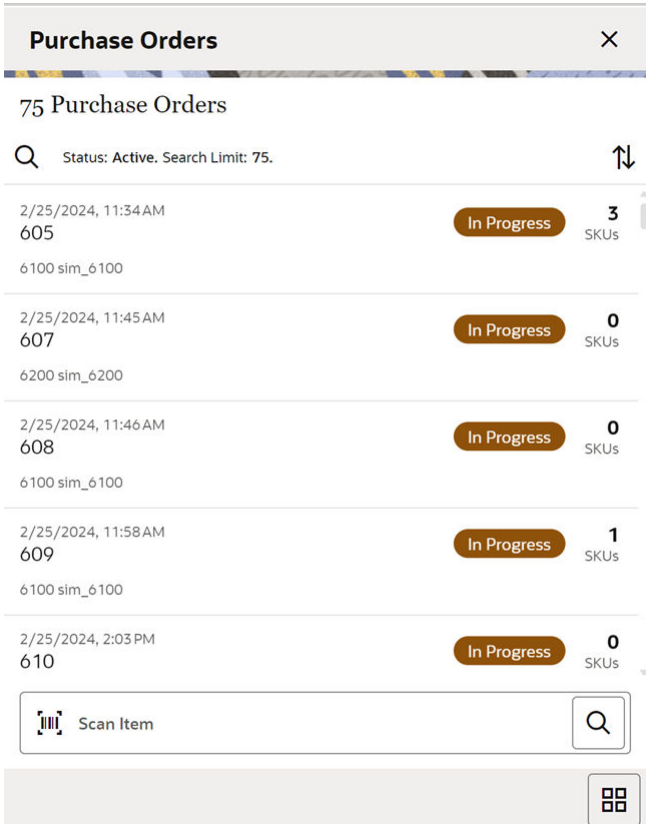
- There will be validation to see if the item exists on the PO document, but the items are not automatically added to the container.
- This will be the option selected by default.

Apply Item(s): This menu option will add all items from the selected PO document to the container without applying the remaining quantity to the received quantity. The system will default the received quantity to zero.

Add Item(s) & Remaining Qty: This menu option will add all items along with their corresponding remaining quantity to the received quantity in the container.

Purchase Orders

Figure 6-32 Purchase Orders Screen



This screen is accessed when you select **Purchase Orders** from the Shipping / Receiving drawer menu.

The Purchase Orders screen allows you to view purchase orders placed with the suppliers to supply goods for your store. The default is to display the list of all active statuses, Approved and In-Progress purchase orders. Use the search criteria screen to filter out the records.

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This screen provides the following header level information about the Purchase Order including the ID that is system internally generated, External ID, Supplier, Not Before Date if available, Create date of the PO, current status of the PO, total number of SKUs, Customer Order ID and Fulfillment Order ID if the customer order is associated with the PO.

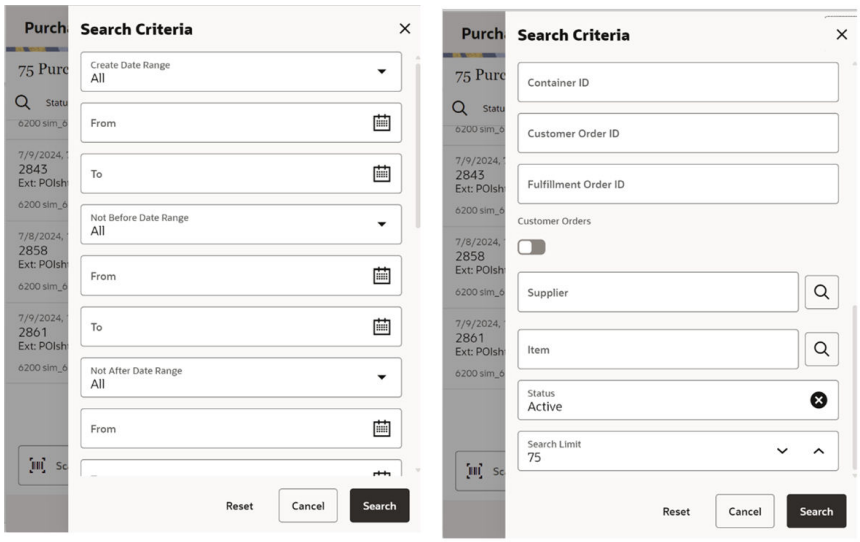
The List header shows the total number of purchase orders listed.

From the Purchase Orders screen, select a purchase order to go to the Purchase Order Items screen and view the item details for the PO.

Purchase orders created internally in the system for on-the-fly deliveries are also shown in this list.

Purchase Orders Search Criteria

Figure 6-33 Purchase Orders Search Criteria Screen



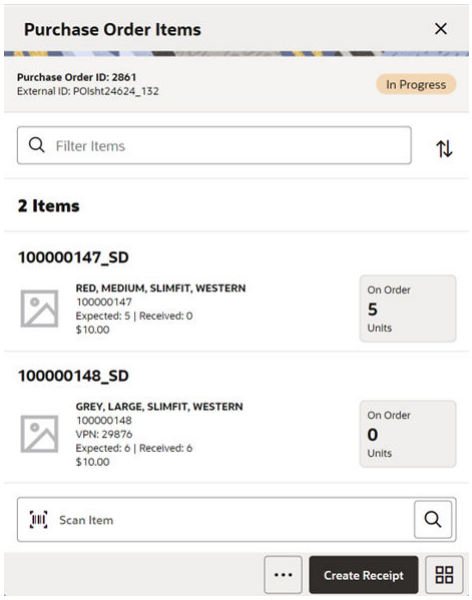
This is the Purchase Orders Search Criteria screen. It is accessed by tapping the search criteria option on the Purchase Orders screen.

You can filter the purchase orders with a variety of search criteria. After applying the criteria, you are returned to the Purchase Orders screen with the purchase orders displayed per the entered criteria.

Purchase Order Items

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Figure 6-34 Purchase Order Items Screen



The Purchase Order Items screen is accessed when you select a purchase order record from the Purchase Orders screen.

The Purchase Order Items screen displays all the purchase order header information and item details for the selected purchase order. This screen is view-only for informational purposes.

On this screen you can find item details such as item id, description, item image, VPN, UOM, on order quantity, expected quantity, received quantity and so on.

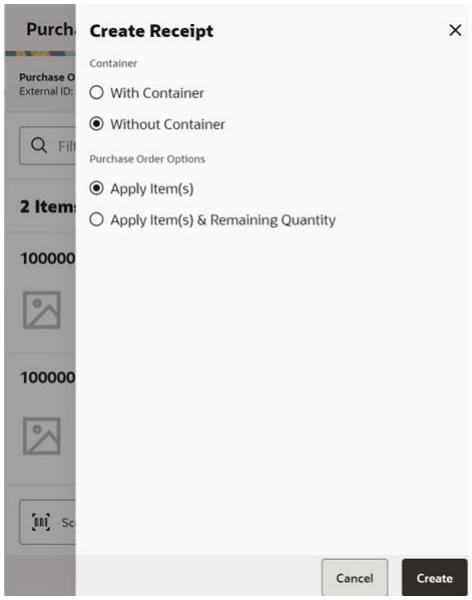
You can access the footer menu and select the Info option to view the details of the PO as described below.

You can create a receipt from the Purchase Order Items screen by selecting **Create Receipt** which will navigate you to the Create Receipt screen.

Create Receipt (Purchase Order Items)

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Figure 6-35 Create Receipt — Purchase Order Items Screen



Create Receipt Details

Container

- This option is displayed and editable only when the user has permission to Allow Modify Default Container Method. If the user does not have this permission, the system applies the default container method automatically.
- You are allowed to select Create Receipt either With Container or Without Container.
- Default : The default value set here is based on the 'Default Container Method for Direct Delivery' store parameter.

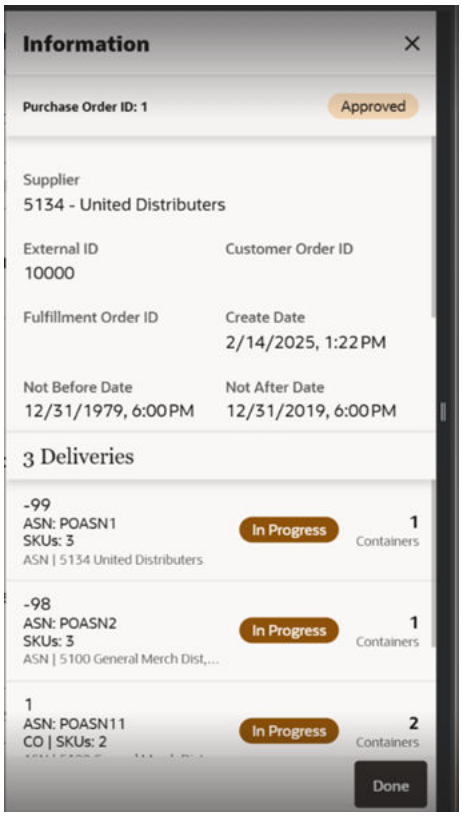
Purchase Order Options

- **Apply Item(s)**
  - This option will set the PO document referenced to the delivery.
  - Any items added will be added/updated to the selected document.
  - There will be validations to see if the item exists on the PO document.
  - This will be the option selected by default.
  - This option will add all items from the selected PO document to the delivery without applying the remaining quantity to the received quantity, and the system will default the received quantity to NULL.
- **Apply Item(s) and Remaining QTY**
  - This option will set the PO document referenced.
  - This option will add all items along with their corresponding remaining quantity to the received quantity in the delivery.
  - If the Remaining quantity is zero, the system will not include the items and default the quantity. However, the user can add items manually if there are any over receiving. For example, if there are 10 items, out of which 5 are fully received in this PO, the system will not load the 5 fully received items but user can manually add them.

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Purchase Order Information

Figure 6-36 Purchase Order — Information Screen



This view only screen is accessed from the Info footer menu on the Purchase Order Items screen. On this screen, you can find information related to the Purchase Order.

This screen provides the following header level information about the Purchase Order: The ID which the system internally generated, External ID, Supplier, Not Before Date if available, Create date of the PO, current status of the PO, total number of SKUs and Customer Order ID and Fulfillment Order ID if the customer order is associated with the PO.

The bottom of the screen will list the deliveries that exist for the purchase order. All of the details about the delivery will be listed including: ID, ASN, number of SKUS, supplier, status and number of containers. Tapping on a delivery will navigate to either the Containers (list) or Delivery Items screens.

Customer Order Reserve on Receipt Auto / Pick

DSD Receiving can be configured to reserve inventory for customer orders upon receiving, and to auto pick the inventory. For additional details on this process, see Customer Orders.

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7

Transfers

This chapter covers the transferring of goods from one location to another. This chapter covers the following topics:

- Transfer Functionality
- Transfer Document (MAF)
- Transfer Document (JET Mobile)
- Transfer Shipping (MAF)
- Transfer Shipping (JET Mobile)
- Transfer Receiving (MAF)
- Transfer Receiving (JET Mobile)

Transfer Functionality

Transfers and allocations define the movement of goods between internal entities or trading partners. Requests from corporate or other stores for shipping inventory out can be auto approved without human interaction and it is possible to transfer unavailable inventory between all entities with a store as a starting or ending point of the transaction.

Transfer functionality in the mobile application is split up into three dialogs: Transfers (Documents), Transfer Shipping, and Transfer Receiving:

- **Transfer Documents** define the logical movement of goods and are often created at corporate. They define the intent of what needs to be shipped.
- **Transfer Shipping** is the physical task of shipping out goods to a store, warehouse, or external finisher.
- **Transfer Receiving** is the physical task of receiving in goods from a store, warehouse, or external finisher.

Transferring features:

- Transfer zone restrictions are enforced
- Initially limit store selection to buddy stores
- Transfers are restricted to store's shipping network
- Auto receiving store to store transfers
- Item with Non-Inventory Indicator set as **Yes** can also be included in a transfer

Business Case

Scenario 1: Warehouse Shipment

1. The store manager is notified that a request for transfer has been created by the merchandising system for a shipment back to warehouse 1.

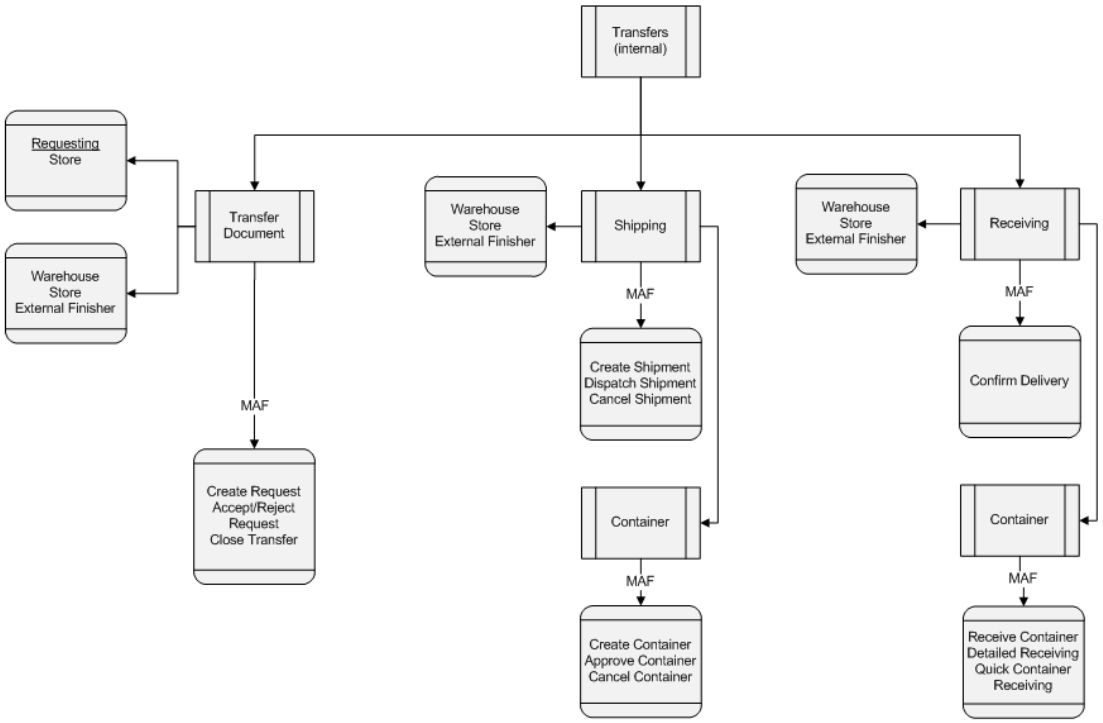
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2. The store manager goes into the transfer document dialog, looks up the request, and determines the request is for shipping back unavailable damaged items.
3. The store manager makes a decision to honor all the items needing shipment and accepts the entire request.
4. The store manager asks the shipping clerk to create a new shipment for warehouse.
5. The shipping clerk goes into the transfer shipment dialog and creates a new shipment and new container for warehouse.
6. The shipping clerk selects the transfer for unavailable damaged items and adds the entire transfer document into the container.
7. The shipping clerk updates the quantity to ship, confirms the container, and subsequently dispatches the shipment. The shipment is ready to go on the truck back to warehouse 1.

Scenario 2: Store to Store Transfer Receipt

1. A user in the convenience Petrol Store creates a transfer request for the main store located on same premises (for example, Fleet Farm and gas station \ can also be used for offsite backroom concept).
2. The user walks to the main store and fills the transfer from the backroom inventory. The shipment is dispatched.
3. The user in the Petrol Store goes into the Transfer Receiving dialog and locates the delivery.
4. The user updates the quantity received and confirms the entire delivery. The transfer document is updated with the received quantity (all items shipped) and closed.

Figure 7-1 Transfer Solution Flow



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Figure 7-2 Transfer > Shipment > Receipt Status Flow

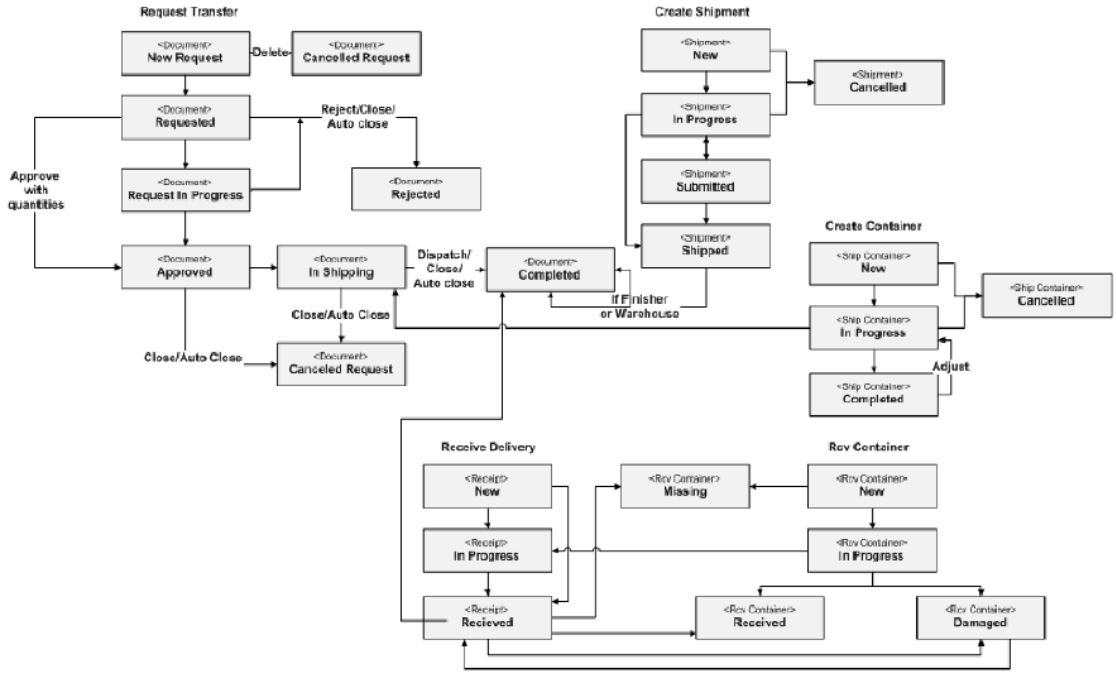
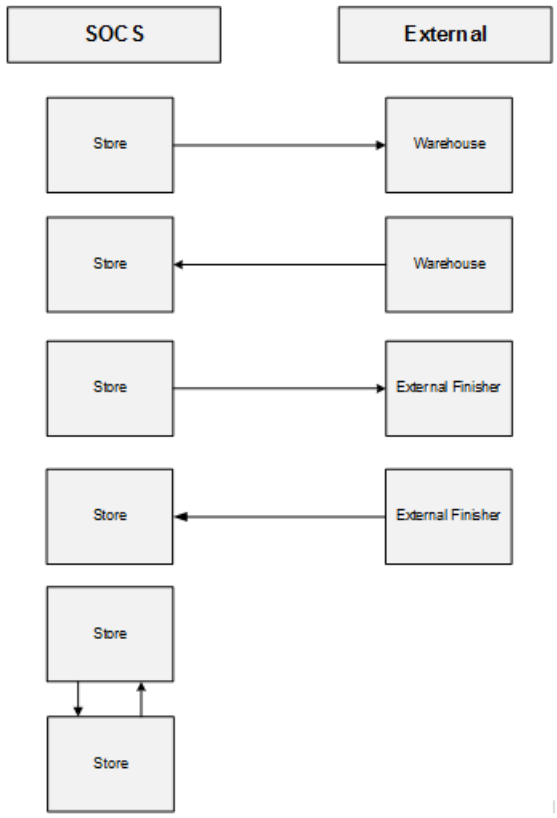


Figure 7-3 Supported Entity Flow



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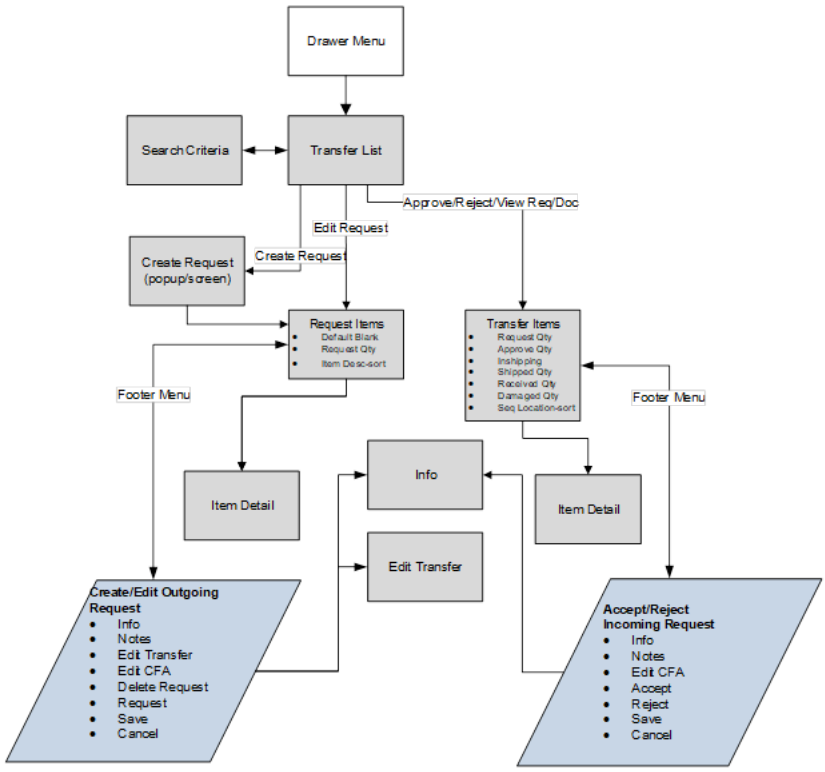
Transfer Document (MAF)

The transfer document dialog allows you to create, accept, and reject transfer documents for the warehouse, store, and external finisher in a single dialog.

Transfer Document features:

- Transfer documents allow the movement of goods between store, warehouse, and external finisher.
- Transfer documents can only be created externally, through the creation of a shipment or are being made as part of a request from another store.
- Transfer requests created externally can be approved or rejected.
- A flow exists to pick items for the transfer document.
- Transfers using unavailable inventory.
- Visibility of shipment and receipt values after transfer approval.
- This will also be a placeholder for Stock Order messages from external system for Store, Warehouse and Finisher deliveries.

Figure 7-4 Transfer Document Mobile Screen Flow



The transfer document you create explains what to ship from one location to another. This includes transfers to a warehouse, store, or external finisher. The following functions are included in the Transfer dialog:

- View Transfer Documents and Requests for Transfer

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- Create, Accept, or Reject a Request
- Look up Shipping and Receiving Details
- Close a Transfer
- Capture values for CFAs (Custom Flexible Attributes)
- Print Reports

Destination Types

- Transfer Shipment to Store (Store to Store):

  To create a Store Transfer Shipment, the destination type of 'Store' must first be identified for the shipment. The system provides a list of valid store locations.

- Transfer Shipment to Warehouse (RTW) and to Finisher (RTF):

  To return items to a warehouse, the destination type of 'Warehouse' must first be identified for the shipment. The system provides a list of valid warehouses. For a Return to Finisher, select a destination type of 'Finisher' and select the destination for the shipment, or search for it using the lookup widget. Finishers are restricted to those which are for the same operating unit as the store.

Customer Orders

Transfer documents can come from the merchandising system to request goods from one store to another store that are for a customer order. These transfer documents will appear in the **Transfer** dialog.

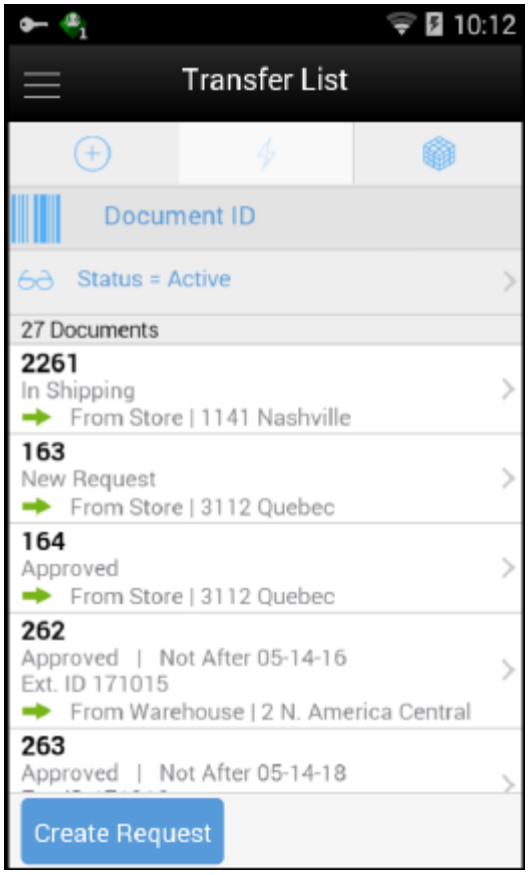
There will be a customer order indicator on the transfer to denote that the transfer has a customer order affiliated with it. When searching for a transfer using the filter, you can search for those transfers that are for customer orders, or search for a transfer that contains a specific customer order and fulfillment order ID.

The details of the transfer will denote if the transfer is for a customer order and the Transfer Info screen will display the specific customer order and fulfillment order ID for that transfer if there is one. **Allow Partial Delivery** is populated based upon the customer order or the system can be configured to not allow partial customer order transfer shipments. If the box is not checked then, when accepting a transfer request, you must accept the full amount being requested. If system parameter **Customer Order Fulfillment Restriction** is set to **Line Controlled**, for transfer requests associated with a customer order, any item getting approved should get approved completely.

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Transfer List

Figure 7-5 Transfer List Screen



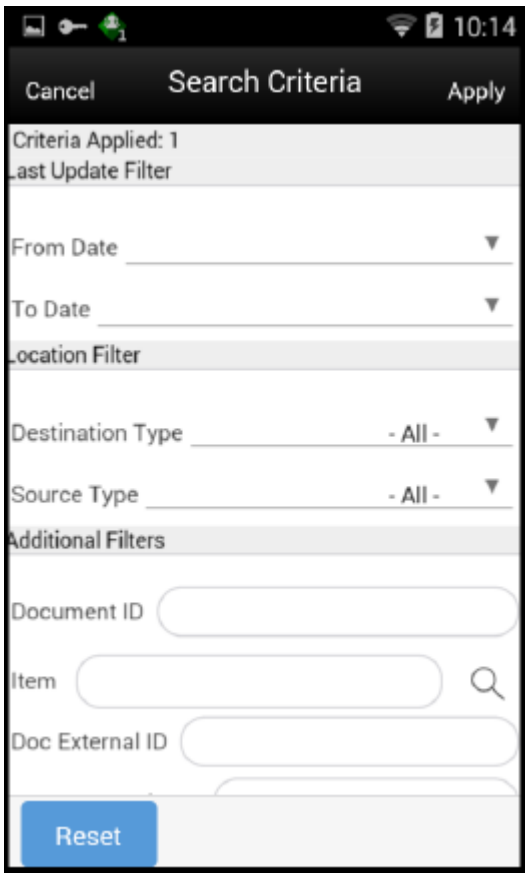
When navigating to Transfers, you go to the Transfer List screen which lists the inbound and outbound transfer requests and documents for your store. This screen displays 'Active' transfers by default. The Transfer List screen is accessed by selecting **Transfers** from the Shipping / Receiving menu drawer.

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Search Criteria (Transfers)

Search Criteria (Transfers)

Figure 7-6 Transfer Search Criteria Screen

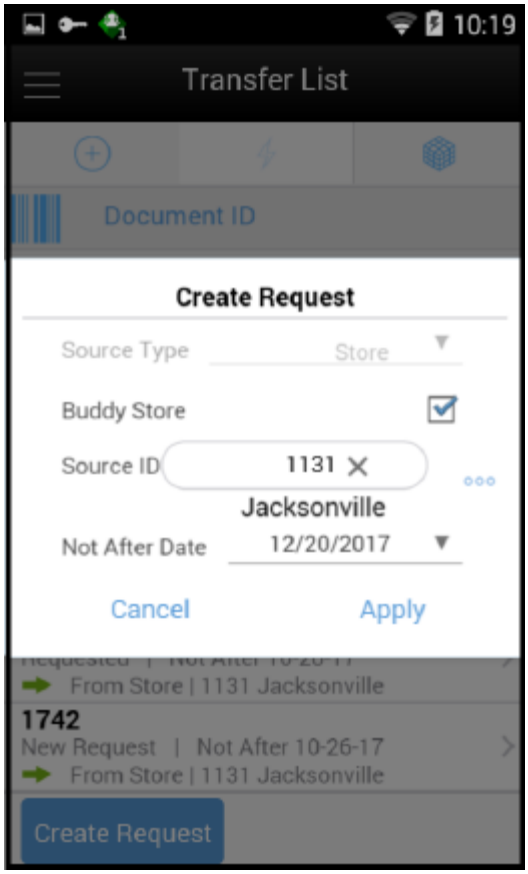


The Transfer Search Criteria Screen is accessed by the eye glasses on the Transfer List screen. After applying the search criteria, the results are listed on the Transfer List screen and the criteria applied is also shown.

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Create Request

Figure 7-7 Create Request Popup



A request is created from the Transfer List screen when a store wants to receive items from another store. A request can be generated from an external system or be created in the mobile application. If the request has been created in the mobile application, then **Source Type** can only be a Store. The request can only be created if the store creating the request is not an excluded store for the Source store, that is, the requesting store must be in the shipping network of the source store in order to request items from a store. A store's shipping network is setup through the 'Store Shipping Network' screen in the desktop application. A store cannot create a transfer requesting for items from a warehouse or a finisher.

From the Transfer Create Request popup, if the **Buddy Store** field is checked, the stores field will automatically list only the buddy stores set up for the store you are logged into, however, any other store can also be searched and selected from the Source field as long as they are within the same transfer zone by unchecking the **Buddy Store** field.

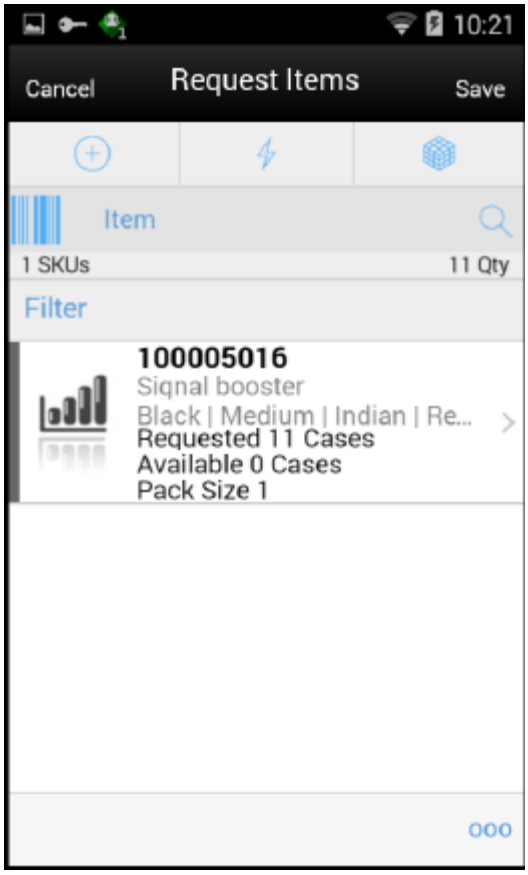
If the store requesting items wants the items before a certain date, a date can be selected or typed into the **Not After Date** field. The request will automatically cancel if not accepted by this date. There are notifications in place to ensure the transaction is fulfilled in time, if configured.

The request needs to be accepted by the other store before a transfer can be shipped. Once accepted, the transfer document can be used to restrict or default items in a shipment/ container.

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Request Items

Figure 7-8 Request Items Screen



The Request Items screen is used when creating a new request. Initially this screen will not have any items. The items screen is also displayed when selecting a saved request from the Transfer List screen. The items are listed for the transfer request. The item image for the line items is displayed per configuration.

Line items appear in a list and selecting a line item navigates to the item details of that item. If an item has been changed in the current session, it is indicated by a bar on the left of the item. This screen also displays a filter. The filter can be used to narrow down the list of items. Filtering can occur by item ID and description. The filter disappears when you scroll down through the list of items.

Items with **Non-Inventory** set as **Yes** is also allowed to be added to the request.

Scanning or entering an item in the scan bar navigates to the Item Detail screen for that item. Quantity may be updated depending on the scan mode. All of those items are grouped together under a single Transfer ID having one header transaction. The item must be unique on the transfer.

The ellipsis in the lower right hand corner accesses the footer menu which contains all of the functions that can be performed on a transfer request.

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Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Request Items screen. The menu functions include the following:

- **Info**: Accesses the Info popup.
- **Notes**: The Notes option accesses the notes common dialog to capture notes.
- **Edit Transfer**: This menu takes you to the Edit Transfer screen and will allow you to enter Context Type, Context Value, Not After Date, and so on.
- **Edit CFAs**: Lets you enter values for the CFAs that are set up for Transfer documents.
- **Request**: Allows you to request the transfer. The Transfer status is updated to Requested and it will appear in the source store. A notification is sent to the source store if configured. If the store parameter 'Context Type/Value required for Transfer' is set to 'Yes', a validation is done at this point to check if the Context Type/Value has been entered for the transfer.
- **Save**: Saves changes without requesting the transfer.
- **Delete**: Deletes the transfer before it is requested.
- **Cancel**: Leave the screen without saving any changes.
- **Back**: Return to previous screen.
- **Print**: Opens the print dialog and allows you to print reports. This option will always be available regardless of the transfer status.

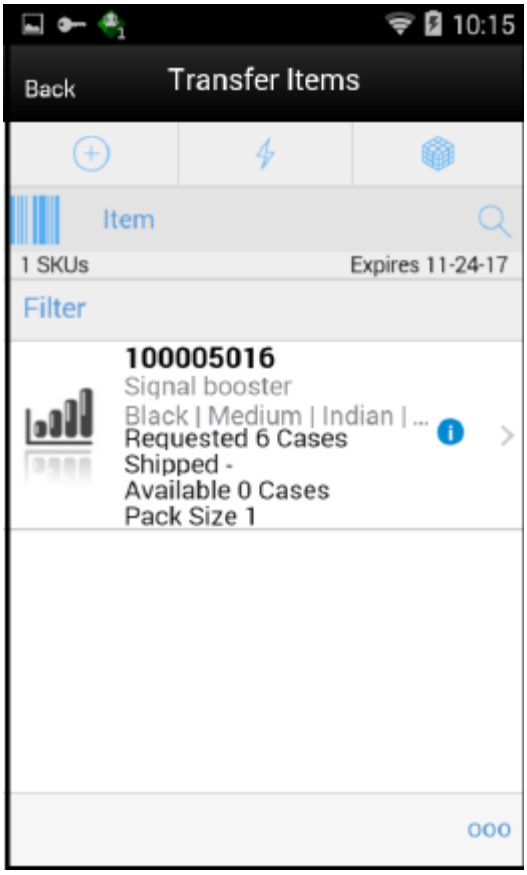
Transfer Items

Accepting/Picking Request

Once the requested transfer is created by the receiving store or in the merchandising system, the user on the shipping side of the transfer can enter approved quantities or pick items and set them aside for eventual shipment. Once the quantities are entered or picking is completed, the transfer moves to an Approved status.

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Figure 7-9 Transfer Items Screen



The Transfer Items screen is displayed when opening a transfer request from the Transfer List screen in the requested store (source store). This screen enables you to pick and approve the quantities to ship, for the requested items. This screen will display the items that have been requested. The item image for the line items is displayed per configuration.

Line items appear in a list and selecting a line item navigates to the item details of that item. If an item has been changed in the current session, it is indicated by a bar on the left of the item. This screen also displays a filter. The filter can be used to narrow down the list of items. Filtering can occur by item ID and description. The filter disappears when you scroll down through the list of items.

Scanning or entering an item in the scan bar navigates to the Item Detail screen for that item. Quantity may be updated depending on the scan mode.

Items with **Non-Inventory** as **Yes** are also allowed to be in the transaction and you can enter approved quantity for these items.

You can add (unexpected items) to ship along with the requested items if you have the necessary security permission.

The ellipsis in the lower right hand corner accesses the footer menu which contains all of the functions that can be performed in this screen.

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Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Transfer Items screen. The menu functions include the following:

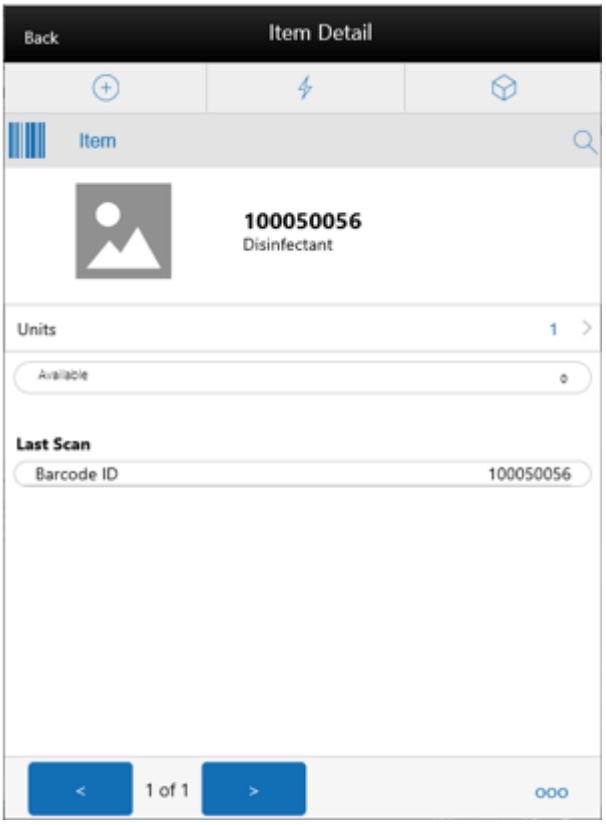
- **Info**: Accesses the Info popup.
- **Notes**: The Notes option accesses the notes common dialog to capture notes.
- **Default Quantities**: Allows you to default the requested quantity to the Approved quantity field for all the items in the transfer.
- **Edit CFA**s: Lets you enter values for the CFAs that are set up for transfer documents.
- **Accept**: Accept to ship the items requested by the requesting store. Before accepting the transfer, the system should validate to ensure that the destination store is not an excluded store for the source store however if the user has **Override Exclude Closed Stores**, the system allows the user to proceed if he wants to.

  If system parameter **Customer Order Fulfillment Restriction** is set to **Line Controlled**, for transfer requests associated with a customer order, any item that is getting approved should get approved in its entirety. Having zero Approved Qty for an item is allowed.
- **Reject**: Rejects the transfer request.
- **Save**: Saves the changes made to the transfer.
- **Close Transfer**: Closes the transfer.
- **Cancel**: Leaves the screen without saving any changes.
- **Back**: Returns to the previous screen.
- **Print**: Opens the print dialog and allows you to print reports. This option will always be available regardless of the transfer status.

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Item Detail (Create/Edit/View Request)

Figure 7-10 Item Detail Screen (Requested Quantity)



The Item Detail screen is used when selecting or scanning an item from the Request Items screen. Scanning or entering an item on this screen in the scan bar updates the quantity per the scan mode and refreshes the Item Detail screen for the item and quantity scanned. This is the screen where you can enter the required quantity for the items that have been requested by the store.

The quantity can be edited and updated manually if permissions allow. The system validates whether the item that is getting requested has enough available inventory at the sending store. If the sending store doesn't have enough available inventory for the item, a soft warning is displayed. A transfer request created in the mobile application should request the item from the available inventory only. However, if the transfer request has been created in an external system, then it can be requested from unavailable inventory also.

Items with **Non-Inventory** set as **Yes** are also allowed to be added to the request.

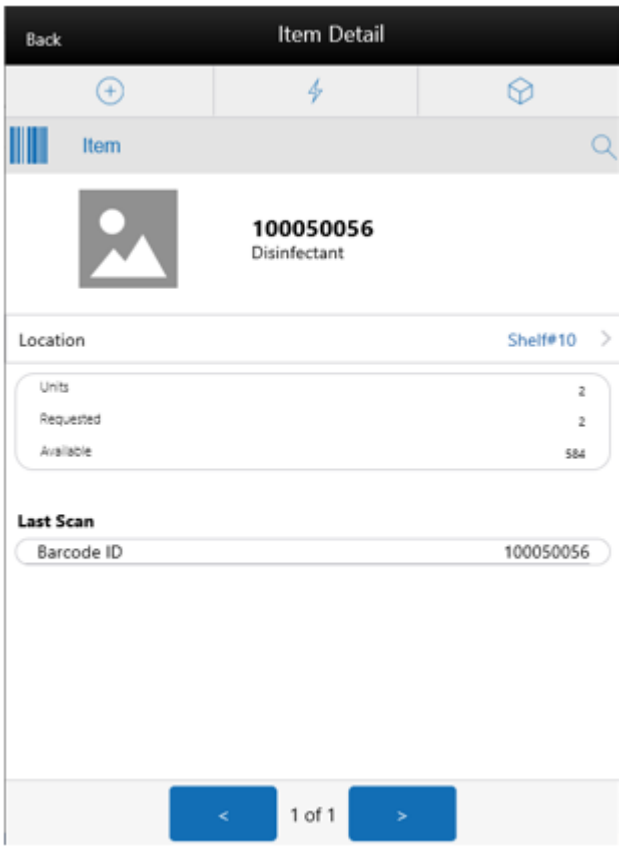
The item information including the image (which is system configured) display in the header. The bottom portion of the screen contains fields for entering the quantity being requested, pack size of the item if the **UOM** mode is Cases and a field that displays the available quantity of the item in the sending store. Lastly, the details of the last scanned barcode will be displayed at the very bottom.

The footer menu, ellipsis button, contains a **Reset** function as well as **Remove** and **Restore** functions. Page through existing items on the adjustment using the arrows on the bottom.

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Item Detail (Accept/Reject Request)

Figure 7-11 Item Detail Screen (Approved Quantity)



The Item Detail screen is used when selecting or scanning an item from the Transfer Items screen. Scanning or entering an item on this screen in the scan bar updates the quantity per the scan mode and refreshes the Item Detail screen for the item and quantity scanned. You can enter the approved quantity for the items that have been requested by another store.

The quantity can be edited and updated manually if permissions allow. Items with **Non-Inventory** set as **Yes** are also allowed to be in the transaction and you can enter approved quantity for these items.

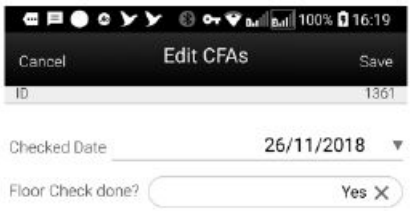
The item information including the image (which is system configured) display in the header. The bottom portion of the screen contains fields for entering the quantity being approved, pack size of the item if the UOM mode is Cases, Primary Location where the item is present if sequencing has been done for the item, field that displays the requested quantity of the item, a field that displays the available/unavailable quantity depending on the inventory bucket from where the item has to be picked. This screen also displays certain fields depending on the status of the transfer request. For example, In Shipping field is displayed if the transfer is in 'In Shipping' status, Received and Damaged quantity fields are displayed if the transfer is getting received at the requesting store. You can view the list of locations where the item is available (if sequenced) to help you to pick the items faster. Lastly, the details of the last scanned barcode will be displayed at the very bottom.

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The footer menu, ellipsis button, contains a reset function as well as remove and restore functions. Page through existing items on the adjustment using the arrows on the bottom.

Edit CFAs Screen

Figure 7-12 Edit CFAs

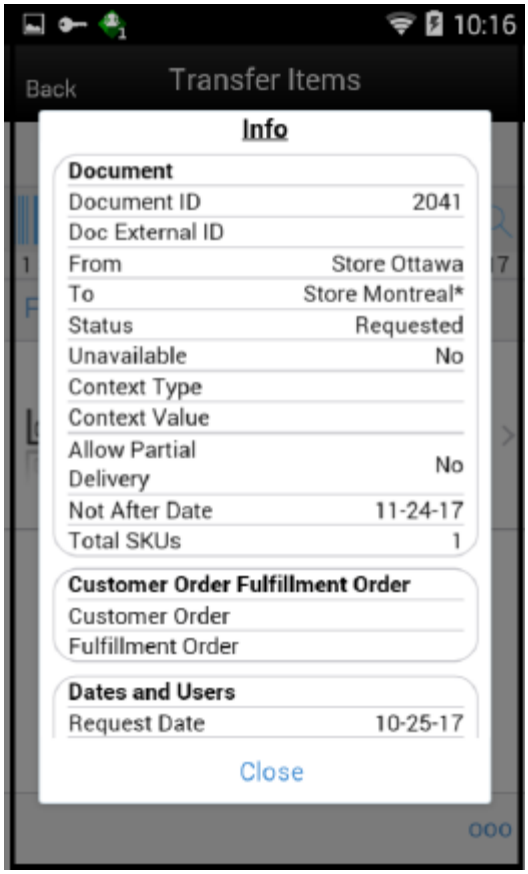


The Edit CFAs screen displays the list of CFAs (flexible attributes) that have been set up for Transfer Documents, in the desktop application and lets you enter values for them. The CFAs that are set up as 'Required' must have a value entered for it before creating/accepting the transfer. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed and the transaction must be in editable status for entering CFA values. For Transfers, the CFAs can be captured for the same transfer in both destination and source stores while creating and approving request respectively. In this case, same set of CFAs will be available at both the stores. The CFAs captured during request create will be available in the Edit CFAs screen of request approve along with the values captured and the values can be overridden.

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Info Screen (Transfer Items)

Figure 7-13 Transfer Items Info Screen

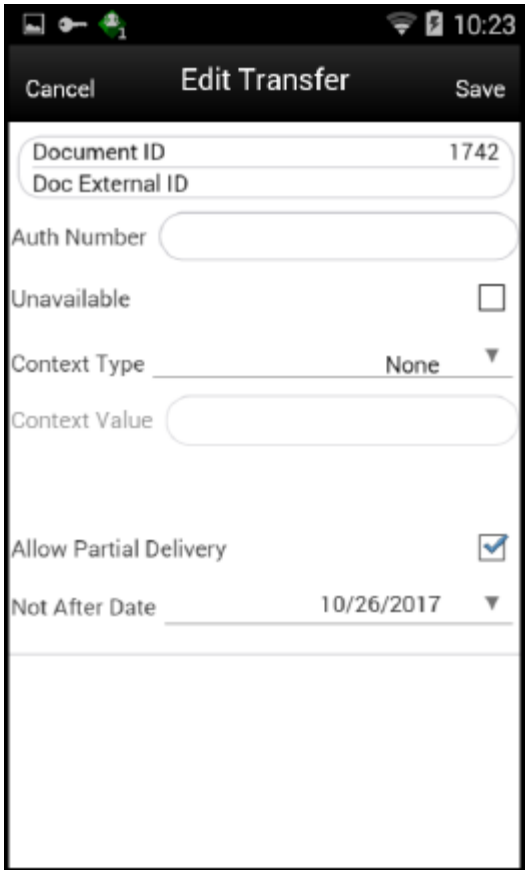


The Info screen is an informational popup that contains read-only information about the header level of the transfer. Details include Transfer Document ID, External Transfer Document ID, Source/Destination Type, Source/Destination ID, Status, Context Type and value, Inventory bucket information (Available or Unavailable), Customer Order/Fulfilment Order info, Request Date/User, Create Date/User, Approve Date and Approval User, Close/Reject Date/User and the CFAs.

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Edit Transfer

Figure 7-14 Edit Transfer Screen



This screen allows you to edit certain information of the transfer request like Context Type/ Value, Not After Date, Allow Partial Delivery (Y/N). You need appropriate permission to edit these fields and this screen is available only when the transfer request is in 'New request' status.

A context type and value can be entered if necessary. The context type is used to give a reason or purpose for the request. For context types of 'PROM', the Context Value field will be displayed and a promo ID will need to be entered or selected from the list of promotions in the lookup. If the promo ID exists, the description for the promotion will be displayed. If the promotion ID does not exist in the system the description displays as 'Unknown'. If the promotion ID is a transfer request from the external system, the context type is disabled.

Transfer Shipping (MAF)

The Transfer Shipping dialog is focused on shipping out containers. Each container can be associated to one or more complete or partial transfer documents. Containers can also be restricted to specific merchandise hierarchies to prevent mixing of items.

Transfer Shipment features:

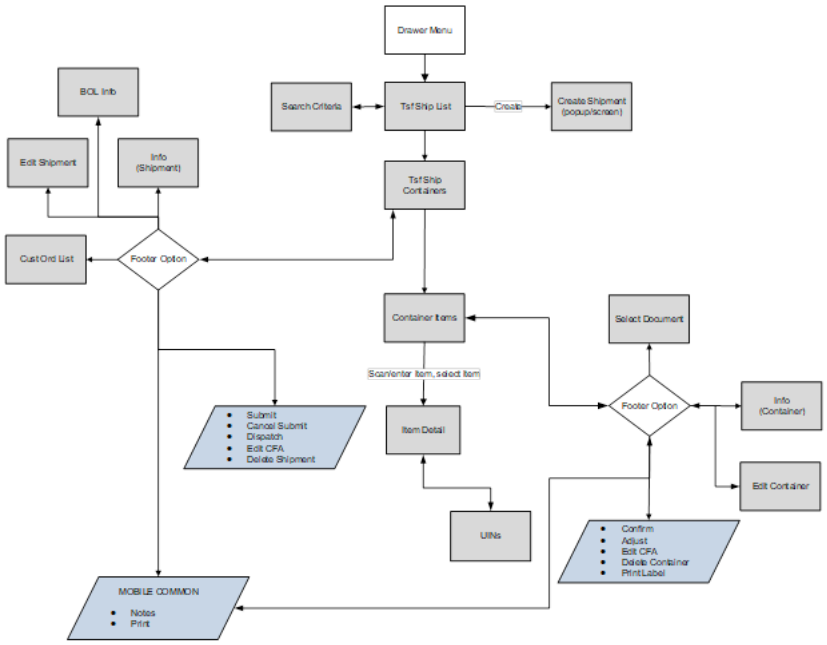
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- Supports shipping to the store, warehouse, or external finisher
- Multiple transfer documents allowed in a single container
- Create container without referencing a transfer document (on the fly)
- Limit store selection by buddy store and transfer zone
- Multiple containers allowed in a single shipment
- Manifest system integration and package tracking ID processing
- Two step approval process to warn of pending shipments
- Restrict merchandise packaged together by merchandise hierarchy

Features

- Search for transfer shipments
- Create a new shipment
- Create a new container
- View or edit an existing shipment or containers
- Delete or cancel 'In Progress' containers or shipments
- Submit, cancel submit, or dispatch a shipment
- Capture values for CFAs (Custom Flexible Attributes)
- Print pre-shipment and manifest

Figure 7-15 Transfer Shipment Mobile Screen Flow



Transfer Shipments are accessed on mobile through the Shipping / Receiving menu within the drawer. Selecting the menu option will take you to the Tsf Ship List screen. On this screen, you can search for shipment records. You can create a shipment, edit or view a shipment.When creating, editing, or viewing a shipment, you are directed to the list of containers within the

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shipment on the Tsf Ship Containers screen. Here, you can create a container, edit or view a container.When creating, editing, or viewing a container, you are directed to the list of items in the container on the Transfer Container Items screen. You can add, view, and edit the details of the items on the Item Detail screen.

On the Item Detail screen, there will be tabs for UINs if the item is a UIN required item and the store is configured for the UIN processing.

You can specify values for CFAs (Custom Flexible Attributes) set up for shipments and containers via the Edit CFAs screen.

Tsf Ship List

Figure 7-16 Tsf Ship List Screen

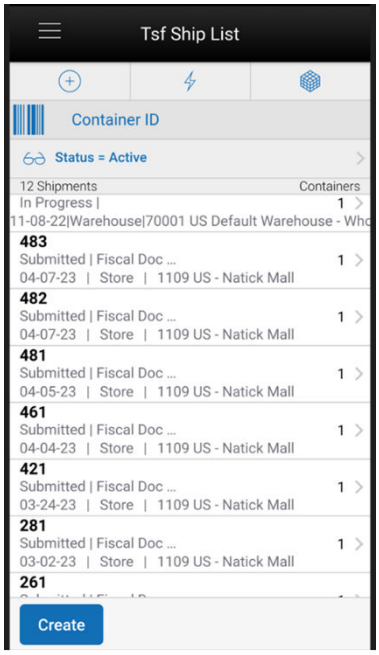
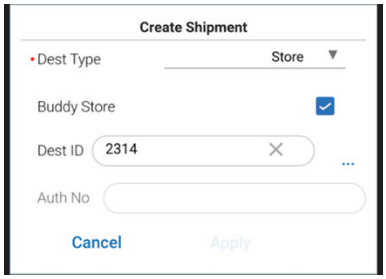


Figure 7-17 Create Shipment Screen



When navigating to Transfer Shipping, you go to the Tsf Ship List screen with the default list being defined for 'Active' shipments. This screen gives a quick view of the list of shipments along with the details such as shipment's status, destination type/name, status of the Fiscal Doc/E-way bill request(if the system is configured to use Fiscal Doc ID/E-way Bill ID), etc.

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You can use the search criteria eye' glasses to navigate to the transfer shipment search criteria screen to enter search criteria for transfer shipments. When scanning/entering a container ID in the scan bar, the system adds the container ID to the entered search criteria and narrows down the current list of shipments by the item scanned. Scan or enter the internal or external container IDs or the tracking ID to find the matching shipments. If there are multiple containers found with the same scanned or entered number, you are prompted to select the shipment/container to return.

The **Create** button prompts you to create a new shipment. You can create a shipment for store, warehouse, or finisher. The destination types for which a user can create a shipment is controlled by the data permission **Transfer Destination Type**.

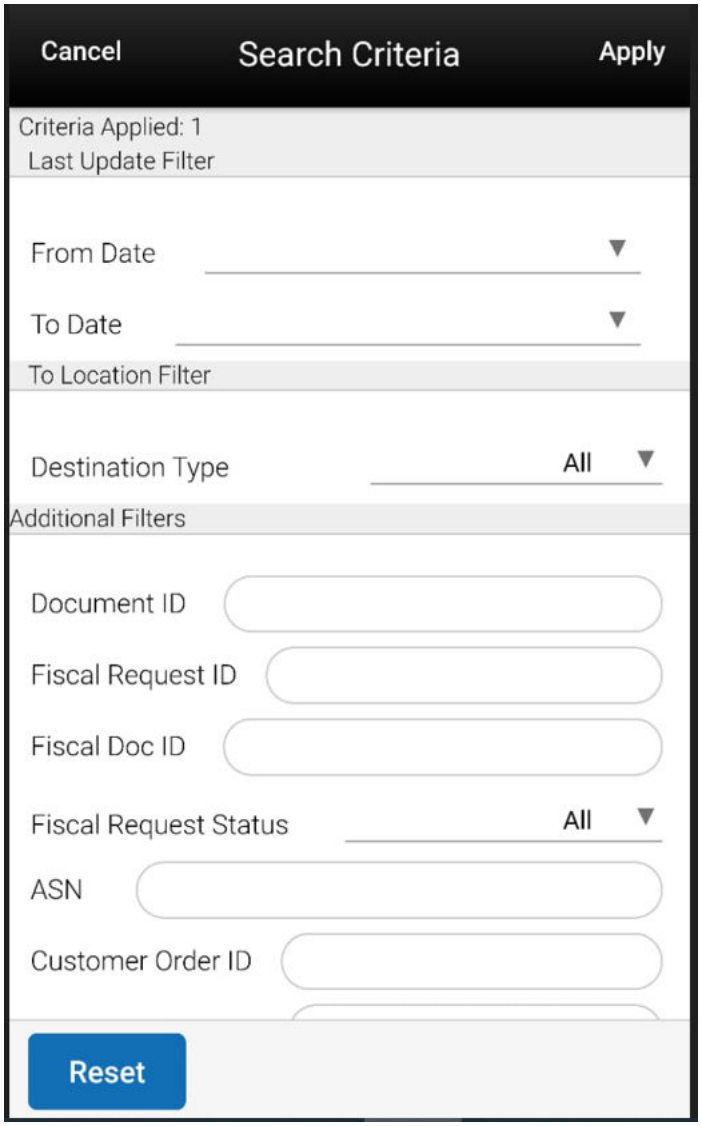
In the case of a shipment to a store, the shipment is allowed to be created only if the destination store is not an excluded store for the source store. That is, the destination store has to be in the shipping network of the source store in order to ship items. However, if the user has **Override Exclude Closed Stores** permission, the system allows the user to proceed with creating the shipment if needed. The user can setup the shipping network for a store using **Store Shipping Network** screen in the desktop application.

Buddy stores are available to allow for searching for a location to ship to that are close in proximity. Creating a new shipment will direct you to the Tsf Ship Containers screen with no containers. If you select an existing shipment, the same screen displays a list of created containers.

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Search Criteria (Transfer Shipment)

Figure 7-18 Search Criteria Screen



The Transfer Shipment Search Criteria screen is accessed by the eye glasses on the Tsf Ship List screen. After applying the search criteria, the results will be listed on the Tsf Ship List screen and the criteria applied will show. The following fields can be searched on from this screen: Last Updated, Destination Type, Destination ID, Destination, Document ID, ASN, Item, Container ID, Customer Order ID, Fulfillment Order ID, Customer Orders Exist, Shipment Status, Context Type, and Context Value. If the retailer has set up the system to use Fiscal Document/E-way bill for the shipments, there will be additional criteria provided in the screen such as Fiscal Request ID, Fiscal Doc ID and Fiscal Request Status.

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Tsf Ship Containers

The containers within a single shipment will display on this screen. If the shipment has just been created, the list will be blank. Several functions may be performed on this screen to include the following:

- Viewing additional details
- Updating authorization number
- Creating a new container
- Viewing existing customer orders
- Set up the carrier shipment details

Submit

The shipment can be saved in 'In Progress' status to continue edits later or it may be submitted or dispatched. Submitting is possible when the store setting Dispatch Validate is configured for 'Ship Submit'. Submitting will set the shipment to a 'Submitted' status and not allow for edits, there are no updates to inventory at this point. The only step possible will be to Cancel Submit or Dispatch. If the system is enabled to obtain Fiscal Doc ID/E-way bill ID for the shipment, the process to request for the same starts once the shipment is submitted.

Dispatch

When the shipment is dispatched, the transfer reserved quantity for the outbound location will decrease in addition to the stock on hand. If no shipping quantities are identified the transaction should be cancelled. Inbound is increased at the receiving store for what has been shipped. If the system is enabled to incorporate Fiscal Doc ID/E-way bill ID as part of the shipping process, the shipment cannot be dispatched until the Fiscal Doc ID/E-way bill ID is available. The exception is when the user has ‘Allow dispatch without Fiscal Document ID’ security permission.

Customer Orders

The Tsf Ship Containers screen has a footer menu option called **Customer Orders**, which when clicked lists the customer orders associated with the containers if any. It will display the Customer Order and Fulfillment Order IDs, along with the Container ID, Status, Total SKUs, and Comments for the customer order.

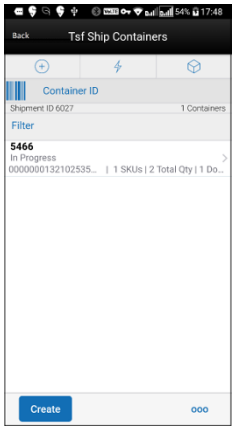
When dispatching a transfer shipment, if the transfer associated to the shipment has **Allow Partial** set to **No**, then you must ship the full amount which is requested.

If any of the containers on the shipment references a transfer with a customer order with **Allow Partial Delivery** indicator is **Yes** and the system parameter **Customer Order Restriction** is set to **Line Controlled**, the items getting delivered has to be delivered in its entirety. Partial delivery of an item is not allowed. This validation is done on both Submit and Dispatch of a customer order.

Upon selecting a container on the Tsf Ship Containers screen, you go to the details of that container on the Transfer Container Items screen.

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Figure 7-19 Tsf Ship Containers Screen



When creating or selecting an existing shipment from the Tsf Ship List screen, you go to the Tsf Ship Containers screen with the list being defaulted to **Active** containers. When scanning/ entering a container ID in the scan bar, the system will navigate you to the **Container Items** screen and display the items currently in the selected container. Scan or enter the internal or external container IDs or the tracking ID to find the matching containers in the shipment.

The create button will create a new container for the shipment. Creating a new container will direct you to the **Container Items** screen with no details (items) in order to build a new container. Lastly, selecting a container from the list will navigate to the details for that container.

Footer Menu

Info: The Info option will access the Info (Shipment) popup.

BOL Info: The BOL Info option will access the BOL Info screen.

Note: The Notes option accesses the notes common dialog to capture notes.

Customer Orders: The Customer Orders option will access the Customer Order List screen.

Create: Create will create a new container in the shipment.

Edit Shipment: Edit Shipment will access the Edit Shipment screen.

Edit CFAs: Enter values for the CFAs that are set up for Transfer Shipments.

Submit: Submit will perform validations for 'In Progress' shipments including excluded store validation and lock the shipment for additional edits. The shipment will be ready for dispatch. This menu option will only be available when the store parameter 'Transfer Shipment Dispatch Validate' is set equal to Ship Submit.

Cancel Submit: Cancel Submit will reverse the Submit and move the shipment back to 'In Progress'.

Dispatch: Dispatch will perform validations including excluded store validation and post transactions to finalize the shipment and no further changes are allowed.

Delete: Delete will mark the shipment to 'Canceled' status.

Back: Back will exit the shipment.

External Printing: External Printing will display the External Printing popup to select a printer for the pre-shipment notice and manifest documents.

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Print: Opens the print dialog and allows you to print various reports and container labels. The Transfer Shipment Container report and the BOL Detail report will be available on this screen.

Edit Shipment

Figure 7-20 Edit Shipment Screen



The **Edit Shipment** screen is used to enter details for the shipment including transportation details.

Details will include: BOL ID, motive, pickup date, ship to address, carrier type, carrier, carrier service and carrier address. The screen also enables the user to specify details such as vehicle number and country, driver name and License number, if the retailer has been using Fiscal Document ID/E-way bill ID in the shipment process.

The **Carrier Type** will be defaulted based on the transfer carrier table; however, you can modify this if necessary. For carrier types of **Third Party**, the Service will need to be selected.

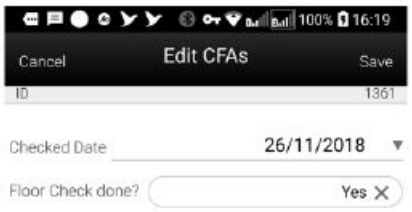
If the shipment is to a warehouse or finisher, you can enter an authorization number.

The Carrier information will be locked down once the container has been confirmed. At that time, the Adjust Carrier button will be available to move the containers back to 'In Progress' which will allow you to make changes to the carrier and other shipment details.

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Edit CFAs

Figure 7-21 Edit CFAs

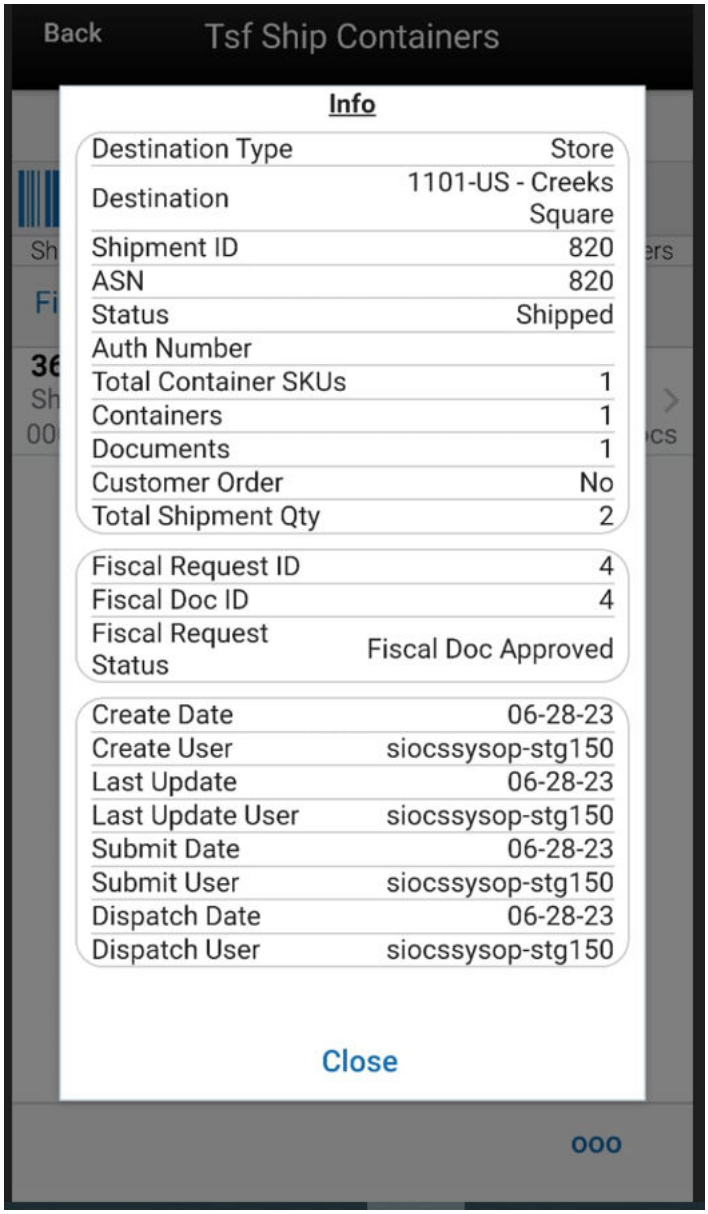


The Edit CFAs screen displays the list of CFAs (flexible attributes) that have been set up for Transfer shipments, in the desktop application and lets you enter values for them. The CFAs that are set up as 'Required' must have a value entered for it before confirming the container. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed and the shipment must be in editable state for entering CFA values.

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Info (Shipment)

Figure 7-22 Info (Shipment) Popup

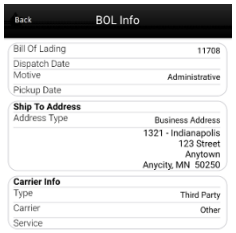


The Info (Shipment) is an informational popup that contains read-only information about the header level of the shipment. Details include: Destination Type, Destination, Shipment ID, ASN, Status, Auth Number, Total Container SKUs, Containers, Documents, Customer Order, Total Shipment Qty, Create Date, Create User, Last Update, Last Update User, Submit Date, Submit User, Dispatch Date, Dispatch User, and the CFAs. The screen also displays details such as Fiscal Request ID, Fiscal Request Status, Reject Reason, Fiscal Doc ID, Fiscal Doc Link, if the retailer has been using Fiscal Document ID/E-way bill ID in the shipment process.

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BOL Info

Figure 7-23 BOL Info Screen



The Bill of Lading (BOL) Info is an informational screen that contains read-only information about the carrier details for the shipment. This screen is view only and the details are managed on the Edit Shipment screen. Details include: BOL ID, Dispatch Date, Motive, Pickup Date, Ship to Address, Carrier Type, Carrier, Carrier Service, and Carrier Address (if entered).

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Customer Order List

Figure 7-24 Cust Order List



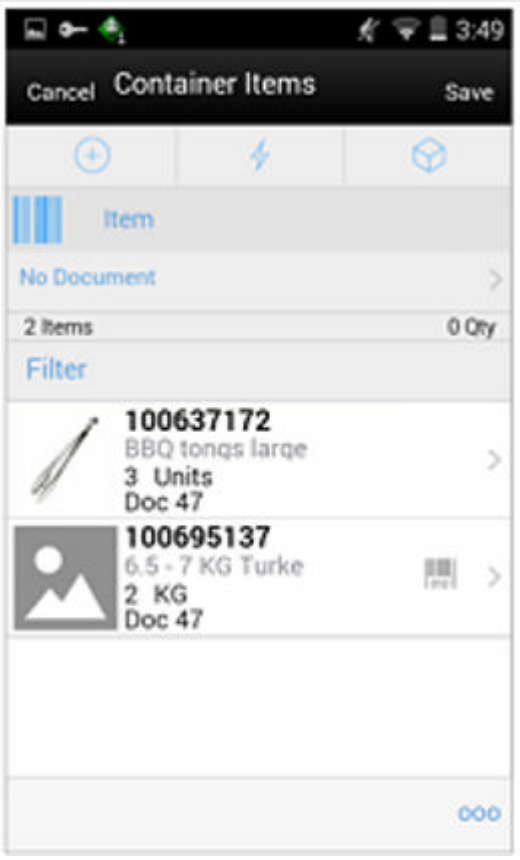
The Cust Ord List is an informational screen that contains read-only information about the customer orders within the shipment. The customer order information will be on the transfer documents selected for the shipment. Details include: Customer Order/Fulfillment Order, Status, Cnt ID, and Container ID.

Scrolling in the list of customer order/fulfillment orders on the left will display a filter. The filter can be used to narrow down the list of items. Filtering can occur by Customer Order ID, Fulfillment Order ID, Container ID, and Customer Order Status.

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Transfer Container Items

Figure 7-25 Container Items Screen



The Container Items screen is used when creating a container or a new container.

There are several functions you can perform on this screen. Some of the features include:

- Create, edit, delete, or confirm a container
- Select transfer items or add loose items
- Manage carrier shipping information

The container can be created with or without referencing a transfer document. When it is created without a transfer document, it can only be created to ship available inventory. With a transfer document, it can be for Available or Unavailable inventory.

When a container is created but not yet completed, the container will display a status of 'In Progress'. The transfer reserved bucket will update the moment the container is saved. When the shipment is dispatched, the saved quantity in the transfer reserved bucket will be removed. This will keep the available quantity accurate.

The items on the list are for the container.

The item image for the line items is displayed per configuration. Line items appear in a list and selecting a line item will navigate to the item details of the item. If an item has been changed in the current session, it will be indicated by a bar on the left of the item. Scrolling in the list of

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items on the left will display a filter. The filter can be used to narrow down the list of items. Filtering can occur by Item ID, Description, Document ID and Reason Code.

If the **Non-Inventory** indicator of the item is set as **No**, the SOH of the item is updated at the completion of the transaction.

If the **Non-Inventory** indicator of the item is set as **Yes**, the item can be added to the transaction however the SOH will not be updated on confirmation/completion of the transaction. That is, the item can be scanned/added to the transaction, and you will be able to enter/update quantity just like a normal (inventory enabled) item. All the processing rules and validations that apply to inventory enabled items would apply for non-inventoried items too except that the validations done on quantity against SOH will be ignored. On dispatch, the SOH of the item will not be updated since the application doesn't preserve the inventory details of the items with **Non-Inventory** indicator set as **Yes**. Publishing of non-inventory items can be restricted depending on administration integration settings.

Inventory Type of items (Available or Unavailable) in the container is held at a container header level. This means that all items in the container must be for the same inventory type, there cannot be a mixture. Once items from a transfer have been added to the container, the inventory type is set for the container and can no longer be changed. However, a shipment may have both unavailable and available containers.

If inventory is from unavailable inventory, the shipped quantity cannot exceed the unavailable stock. If the system is configured to use sub-buckets, then the sub-bucket associated to the reason codes which are for unavailable inventory will be displayed. The sub-bucket will be updated as the unavailable inventory is updated.

When a container is setup to use unavailable inventory, a reason code must first be selected before being able to add or edit an item in the container. The reason code is selected on the Edit Container screen. Containers that are setup to use available inventory will not use reason codes. The reason code selected is at the header level for the container and it will be applied to all newly added items until it is changed to a different reason, in which the newly changed reason will be added to the newly added items.

Scanning or entering an item in the scan bar will navigate you to the Item Detail screen for the item. Quantity may be updated, depending on the scan mode. If the user scans the Item ID of a UIN item or if he scans a UIN, he will be taken to the UIN tab of the Item Detail screen.

Directly below the scan bar, the currently selected transfer document will display. When first entering the container, 'No Document' will be displayed. You will need special permissions to add items without selecting a document. Access the active documents by tapping on this bar which to take you to the Select Document screen.

Next to each item, the UIN icon will display if the UINs have been associated to the item.

The ellipsis in the lower right hand corner will access the footer menu which will contain all the functions that can be performed on a container.

Footer Menu

Info: Info will access the Info (Container) popup.

Notes: Accesses the notes common dialog to capture notes.

Edit Container: Accesses the Edit Container screen.

Edit CFAs: Enter values for the CFAs that are set up for Transfer Shipment Containers.

Adjust: Reopens a container in Completed status and moves it back to In Progress.

Confirm: Moves the container in an In Progress status to Completed.

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Save: Saves the container in 'In Progress' status to be completed later. This option is only available when the screen is in edit mode.

Print: Opens the print dialog and allows you to select formats and print various reports and container labels. The Transfer Shipment Container report will be available on this screen.

Print Tickets: Opens the Print Tickets dialog to print the tickets or labels for the current container items. This is described in common usage chapter with more details.

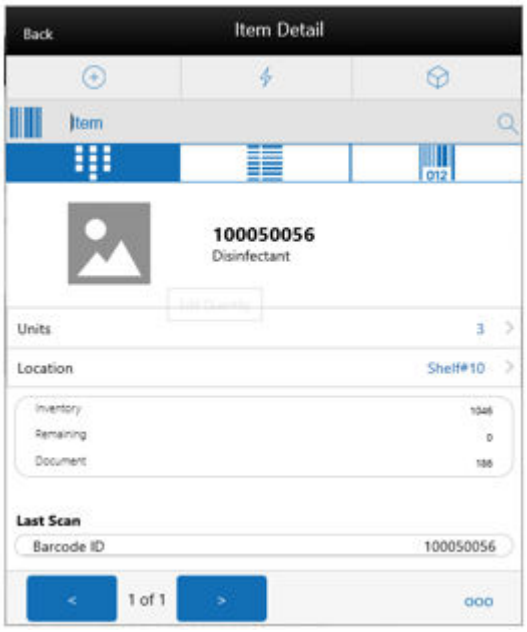
Delete: Marks the container to 'Canceled' status. This option will only be available for containers that are in a New or In Progress status.

Cancel: Exits the container and changes made in that session will not be saved. This screen is only available when the screen is in edit mode.

Back: Returns to the previous screen. This option is only available when the container is view only.

Item Detail (Quantity)

Figure 7-26 Item Detail (Quantity) Screen



The Item Detail screen is the screen is used when selecting or scanning an item from the Container Items screen. Scanning or entering an item on this screen in the scan bar will update the quantity per the scan mode and refresh the item detail screen for the item and quantity scanned. The quantity can be edited and updated manually if permissions allow. Items with Non-Inventory Indicator set as **Yes** are also allowed to be in the transaction and you can enter ship quantity for these items.

If the user scans the Item ID of a UIN item or if he scans a UIN, he will be taken to the UIN tab of the Item Detail screen.

The item information including the image which is system configured to display in the header. The bottom portion of the screen containers information fields of inventory qty, remaining qty, document qty and reason code (for unavailable inventory only) pertaining to the bucket stock is

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coming from. Lastly, the details of the last scanned barcode will be displayed at the very bottom.

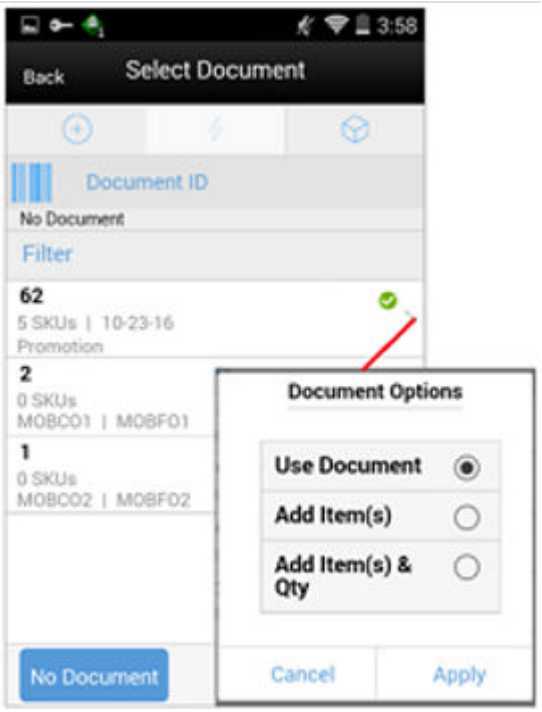
The footer menu (ellipsis button), contains a reset function as well as remove and restore functions. Page through existing item in the container view the arrows on the bottom.

There is also a UIN tab to take you to the UIN screen to add and remove UINs for UIN items.

There is also an **Extended Attributes** tab that enables the user to view/capture Extended Attributes for the item. If the item is not configured to capture extended attributes or there are no extended attributes captured, the list will be empty.

Select Document

Figure 7-27 Select Document Screen



The Select Document screen is used for adding items to ship into the container. Access this screen by tapping the Document ID in the header bar of the Container Items screen. If there are no approved documents to display, the list will be empty. The list is sorted by documents with a remaining quantity on top, then by not after date, and then by document ID.

A list of documents for Inventory Type of 'Available' or 'Unavailable' will display based on the selected option on the Edit Container screen. The default will be to display documents with inventory type set to available.

Additionally, if you have placed a hierarchy restriction on the container using the Limit Item To drop-downs on the Edit Container screen, only those documents with items matching the criteria will display. This will happen once the restriction is set by adding the first item to the container. If the container is empty, all documents will be displayed for the appropriate inventory type.

Scanning or entering a document ID on this screen in the scan bar will display the Document Options popup if any are found. Scrolling in the list of documents on the left will display a filter.

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The filter can be used to narrow down the list of documents. Filtering can occur by Document ID, External ID, Customer Order ID, Fulfillment Order ID, Context type, and Context value.

The following icons will be displayed to indicate the status:

- Green circle with check indicates the document has remaining quantities.
- Orange triangle with exclamation point indicates the document has no remaining quantities.

Options to Add to Container

You can select an approved transfer document and have different options to apply the items. When you are working in the container screen, any items added manually, will be added to the selected transfer document. If you do not want to add the items to the transfer, select **No Document** from this screen, to clear out the selection. Items added manually will be added to the Ad Hoc transfer if no document is selected, otherwise they are added to the transfer doc selected. Adding loose items to a container is only allowed for Containers setup for Available inventory.

- Apply Item(s): The items are pre-filled in the container without quantities.
- Apply Item(s) & Quantity: The items with their remaining quantity are added into the container.
- Use Document: Manually add the items to the container validating against the selected document. You are prompted when an item does not exist on the document. If not, you may or may not have the ability to add to the container or to the selected document.

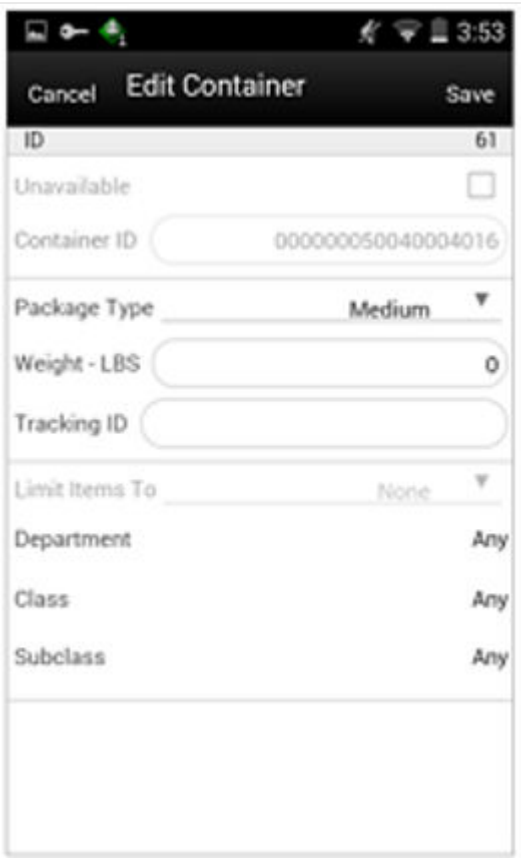
Once the document and items are selected, the document ID is populated in the header of the container detail screen as well as next to each item added to the container. There are various permissions that will control which options you can perform.

The **No Document** button is used to clear the selected document. You need special permissions to use this button. Any items added to the container when No Document is selected, will be added to an ad hoc transfer created for the entire shipment for any unexpected items not associated with an existing transfer. The button will not be available when the container has been setup to pull items from unavailable inventory buckets since a pre-created transfer document is required.

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Edit Container

Figure 7-28 Edit Container Screen



The Edit Container screen is used to enter details for the container including transportation details. You navigate to this screen from the footer menu on the Container items screen. Details will include: ID, Inventory Status, Container ID, Package Type, Weight, Tracking ID, and Container Restriction by Hierarchy. If the inventory status is Unavailable, the Reason Code and Sub-buckets (if configured to use sub-buckets) will also be available.

The inventory status and the container restriction by hierarchy will be locked down once the first item has been added to the container.

Limit Items to (Hierarchy Restriction)

If you want to set up the container to restrict the container to hold the same type of items, set up the container to restrict by department, class, and subclass. You do not select the actual department, but set the hierarchy level to restrict by. When the first item is added to the container, the department, class, and/or subclass is set for the container based on the hierarchy the item is part of. The container detail screen will display the hierarchy that is locked in. Any items added subsequently must match the hierarchy of the first item. For example, if the restriction was set up to limit items to the same department and the first item added was for the Women's Department, only items that match the Women's Department can be added to the container, but it will not matter which class and subclass the item is in since the hierarchy level is set at Department.

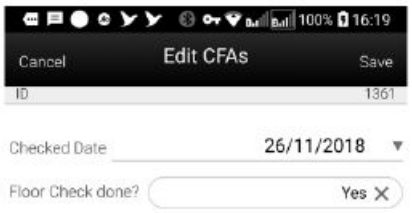
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The hierarchy level is auto defaulted depending on the permission you have been given.

If manifesting has been configured, the package type and weight may be required by the carrier selected for the shipment before you can confirm the container.

Edit CFAs Screen

Figure 7-29 Edit CFAs

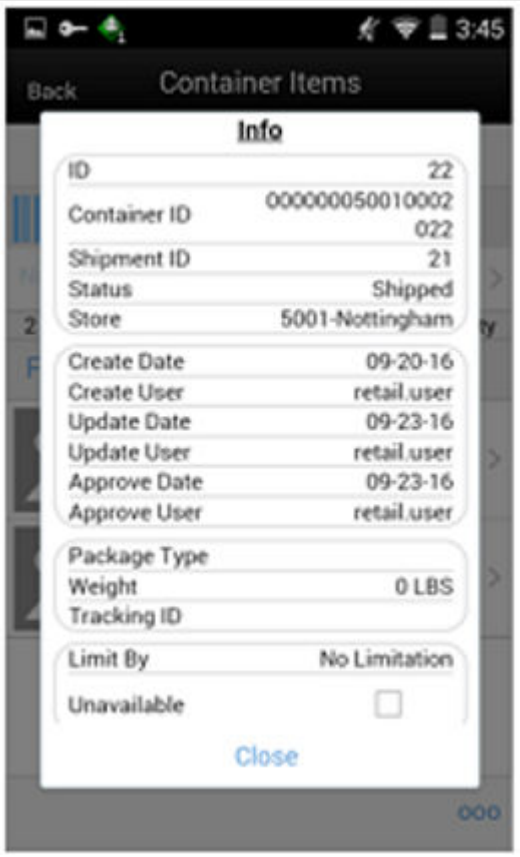


The Edit CFAs screen displays the list of CFAs (flexible attributes) that have been set up for Transfer shipment containers, in the desktop application and lets you enter values for them. The CFAs that are set up as 'Required' must have a value entered for it before confirming the container. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed and the container must be in editable state for entering CFA values.

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Info (Container)

Figure 7-30 Info (Container) Popup



The Info (Container) is an informational popup containing read-only information about the header level of the container. Details include: ID, Container ID, Shipment ID, Status, Destination Type and Destination, Create Date, Create User, Update, Update User, Approve Date, Approve User, Package Type, Weight, Tracking ID, Container Hierarchy Limit, Inventory Status, and the CFAs.

Transfer Receiving (MAF)

The receiving dialog allows users to receive store, warehouse and external finisher deliveries with containers. It allows these containers to be received blind, without you knowing the expected quantity. The containers can also be for unavailable inventory. Lastly, the mobile application supports misdirected containers or unexpected containers originally not listed on the delivery.

Transfer Receiving features:

- Receive by Advance Shipment Notice (ASN), container, item level, or automatically
- Record damages during receiving
- Blind receiving

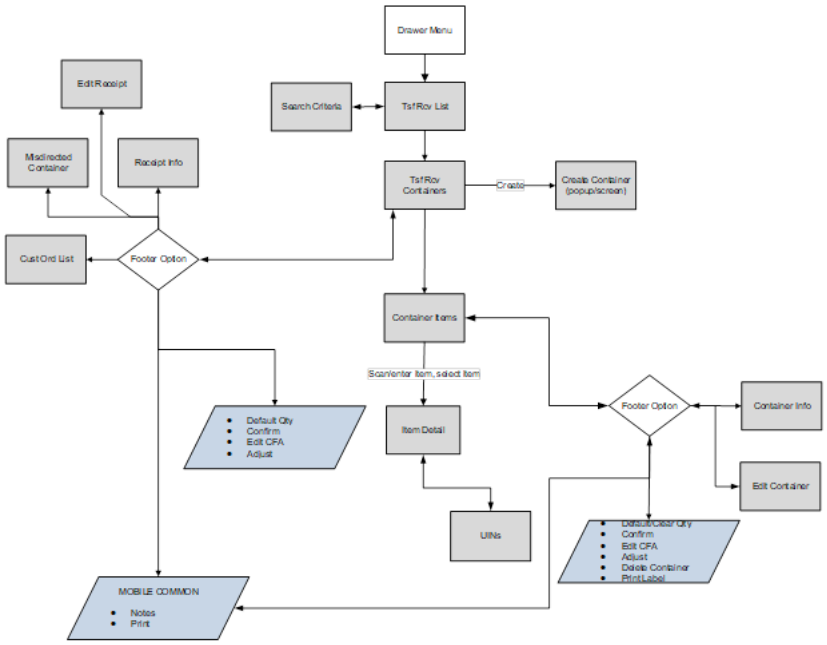
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- Manage container deliveries for another destination or creating an additional container
- Multiple methods to scan and identify the container delivery (GS1, Container ID, Tracking ID)
- Inventory updated immediately as containers are scanned and confirmed

Mobile Features

- Search for transfer receipts
- Create a new container
- View or edit an existing receipts or containers
- Capture values for CFAs (Custom Flexible Attributes) for the delivery and containers
- Delete or cancel 'In Progress' containers or receipts
- Confirm, mark damage, mark missing, or receive a container

Figure 7-31 Transfer Receiving Mobile Screen Flow



Transfer Receiving is accessed on mobile through the Shipping / Receiving menu within the drawer. Selecting the menu option will take you to the Tsf Rcv List screen. On this screen, you can search for delivery/receipt records which will be presented on the Tsf Rcv List screen. You can edit or view a delivery/receipt.

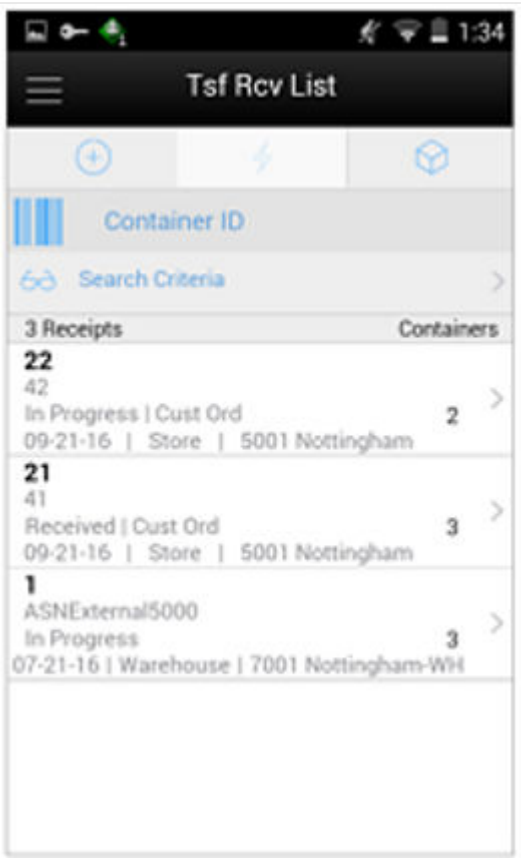
When editing or viewing a delivery/receipt, you will first be directed to the list of containers within the delivery/receipt on the Tsf Rcv Containers screen. You can create a container, edit or view a container, capture values for CFAs.

When creating, editing, or viewing a container, you are directed to the list of items in the container on the Container Items screen. You can add, view and edit the details of the items on the Item Detail screen. The Item Detail screen has tab for UINs if the system and/or item is configured. You can also capture values for CFAs that are setup for the containers.

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Tsf Rcv List

Figure 7-32 Tsf Rcv List Screen



When navigating to Transfer Receiving, you go to the Tsf Rcv List screen with the default list being defined for 'Active' receipts meaning 'New' or 'In Progress' status.

These deliveries are all populated through the system from an internal or external source. The ASN corresponds to the Shipment ASN for a store to store transfer.

Use the search criteria eye glasses to navigate to the transfer receipt search criteria screen to enter search criteria for transfer receipts. When scanning/entering a container ID in the scan bar, the system adds the scanned container ID to the entered search criteria and narrows down the current list of receipts by the container ID scanned. Scan or enter the internal or external container IDs to find the matching containers in the receipt.

Selecting a receipt will direct you to the Tsf Rcv Containers screen and will display a list of containers.

An estimated expected date will be populated if one exists in the ASN. When the delivery has been received, the receive date field will be updated. You can identify any container marked as missing or holding customer orders.

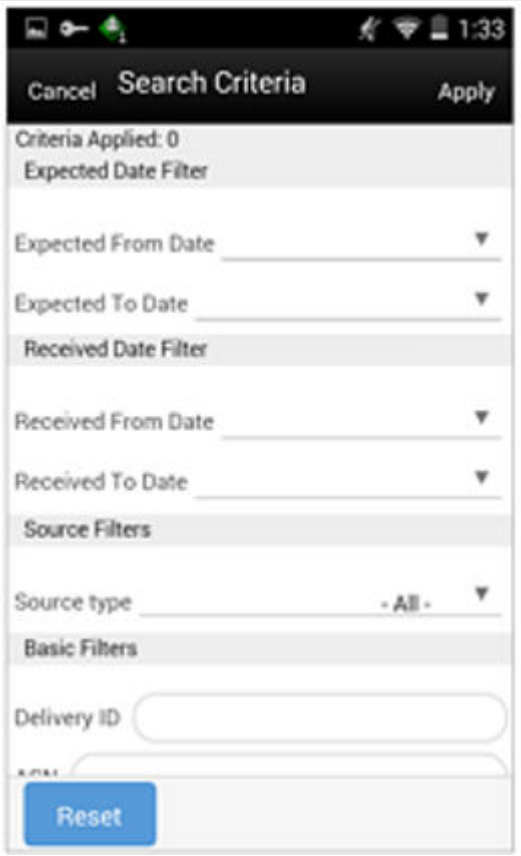
This screen allows you to identify if the transfer being received is for a customer order.

If an unexpected container arrives, search for the container using the misdirected container screen. Receiving notes may also be captured at the receipt and container level.

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Search Criteria (Transfer Receiving)

Figure 7-33 Search Criteria (Transfer Receiving) Screen

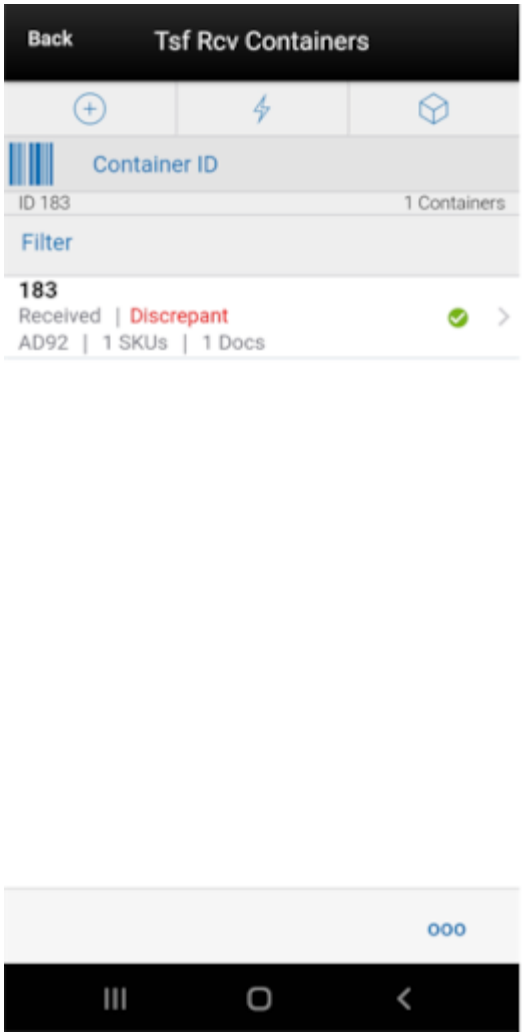


The Transfer Receiving Search Criteria screen is accessed by the eye glasses on the Tsf Rcv List screen. After applying the search criteria, the results will be listed on the Tsf Rcv List screen and the criteria applied will show. The fields available to search by include: expected date, received date, source type, source ID, source, delivery ID, asn, item, status, container ID, document ID, customer order ID, fulfillment order ID, customer orders exist, context type, and context value. Transfer Deliveries can also be searched based on Fiscal Doc ID/E-way Bill ID.

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Tsf Rcv Containers

Figure 7-34 Tsf Rcv Containers Screen



When selecting a receipt from the Tsf Rcv List screen, you go to the Tsf Rcv Containers screen with the list showing 'Active' containers above the rest. When scanning/entering a container ID in the scan bar, the system navigates you to the Container Items screen and display the items currently in the selected container.

You can scan or enter the internal or external container IDs to find the matching containers in the receipt.The filter can be used to narrow down the list of containers. Filtering can occur by internal ID, container ID, and container status.The following icons will be displayed to indicate the status of the container: green circle with check indicates the container is received, orange triangle with exclamation indicates the container is damaged, and the red circle with exclamation indicates the container is missing. If the container is in a 'New' or 'In Progress' status an icon will not display.

For containers in statuses 'Received' or 'Damaged', if they are 'discrepant', a label called 'Discrepant' will be displayed in red color.

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Containers can be received individually by selecting the container. Click **Default Qty** and, all items received quantity for each container is set to the expected quantity. Containers can only be received at a container level if they have not been received at the item level.

If the delivery has already been received and if the receipt date is within the system configured number of days allowed to adjust a receipt, it is possible to reopen the specific container on a receipt by clicking the container. Adjust the container from within the container dialog.The receipt can be saved as 'In Progress' to complete receiving at a later time. Saving the receipt will not make any updates to the stock on hand.

Confirming the receipt will mark all containers, with received quantities, to Received. Stock on hand is updated when the status of the container changes to Received, either from within the receipt details or from within the Container. Any containers with no received quantities will be marked as Missing.

When confirming the transfer receipt, if there are containers that are in 'New' status (the items will not have any quantities):

- If the user has the **Allow Default Zero at Confirmation** permission, the system will prompt the user if they would like to set the quantities to 0. If the user chooses **Yes** to the prompt all items that have a blank quantity value will be set to 0. If the user chooses **No**, the user will return to the screen and nothing is updated.
- If the user does not have the **Allow Default Zero at Confirmation** permission, the user will not be able to confirm the delivery and will return to the screen. At this point the user will have to either save it for someone else with proper permission to confirm, or receive the items that are blank.

When confirming the transfer receipt, if there are containers that are in 'In Progress' status with discrepant quantities (Received is not equal to Expected), the user will be prompted that there are discrepant items:

- If the user has the **Allow Default Zero at Confirmation** permission, the system will prompt the user to set the quantities to 0. (Same as above)
- If the user does not have the **Allow Default Zero at Confirmation** permission, the user will not be able to confirm the delivery and will return to the screen. (same as above)

Customer Orders

The screen has a footer menu option to go to the Customer Order List screen. This enables you to identify the list of customer orders associated with this delivery, if any.

Selecting a container from the list takes you to the Container Items screen.

Footer Menu

Info: Info will access the Info (Receipt) popup.

Notes: The Notes option accesses the notes common dialog to capture notes.

Customer Orders: Accesses the Customer Order List screen.

Create: Creates a new container in the receipt.

Edit Receipt: Accesses the Edit Receipt screen.

Edit CFAs: Lets you enter values for the CFAs that are set up for transfer deliveries.

Default Qty: Copies the expected quantity to the received quantity field for all containers on the delivery/receipt.

Misdirected Container: Accesses the Misdirected Container screen.

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Confirm: Confirm will set the receipt to a 'Received' status.

Back: Exits the receipt.

Print: Opens the print dialog and allows you to select formats and print various reports and container labels. The Transfer Receipt report is available on this screen.

Edit Receipt

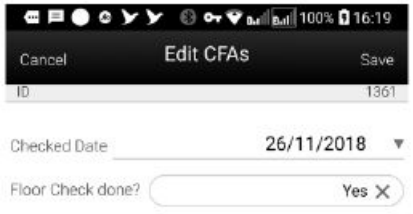
Figure 7-35 Edit Receipt Screen



The Edit Receipt screen is used to enter details for the delivery including transportation details. Details include: ASN, Carrier Name, Carrier Type, Carrier Code, License Plate, Freight ID, Bill of Lading, and Delivery From Address.

Edit CFAs Screen

Figure 7-36 Edit CFAs

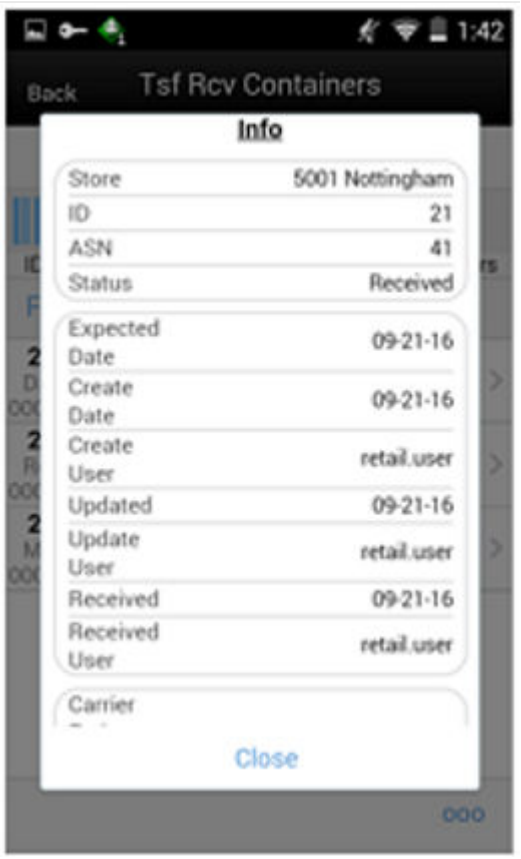


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The Edit CFAs screen displays the list of CFAs (flexible attributes) that have been set up for transfer delivery containers, in the desktop application and lets you enter values for them. The CFAs that are set up as 'Required' must have a value entered for it before confirming the receipt. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed and the delivery must be in editable state for entering CFA values.

Transfer Receiving Info (Receipt)

Figure 7-37 Info (Receipt) Popup

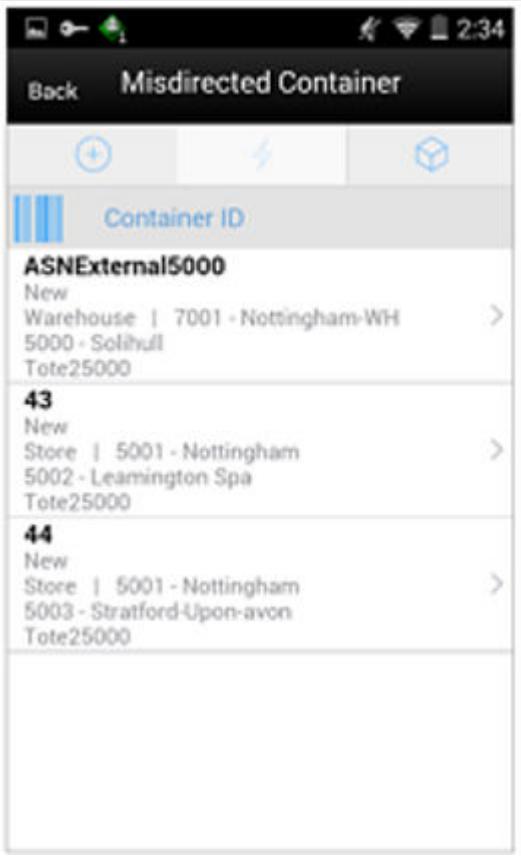


The Info (Receipt) is an informational popup that contains read-only information about the header level of the receipt. Details include: Source Type, Source, ID, ASN, Status, Expected Date, Create Date, Create User, Updated, Update User, Received, Received User, Carrier Entity, Carrier Type, Carrier Code, License Plate, From Address, Freight ID, Bill of Lading, and the CFAs. The License Plate and Freight ID fields may be used for other purposes, such as a Weigh Bill ID or BOL ID. The field names can be customized by the client.

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Misdirected Container

Figure 7-38 Misdirected Container Screen



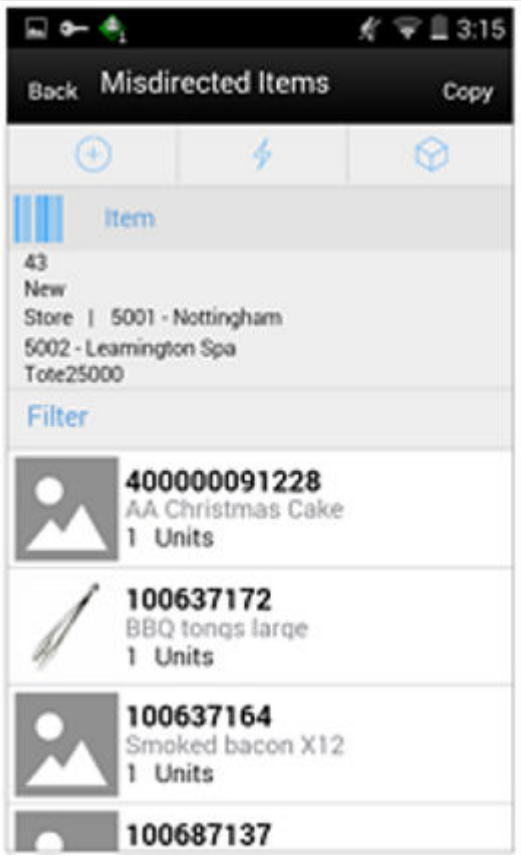
When selecting Misdirected Container from the Tsf Rcv Containers screen, you go to the Misdirected Container screen with the screen showing an empty list. When scanning/entering a container ID in the scan bar, the system will display matching containers available in the entire enterprise. Scan or enter the internal or external container IDs or Tracking ID to find the matching containers in the receipt.

When selecting a container within the list, you are taken to the Misdirected Items screen.

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Misdirected Items

Figure 7-39 Misdirected Items Screen



The Misdirected Items screen used when selecting a container from the Misdirected Container screen. Details about the intended destination are displayed at the top of the screen. The details include: ID, Container Status, Source Type, Source, Destination Type, Destination, and Container ID. When scanning/entering an item in the scan bar, the system will update the filter bar and display the resulting item.

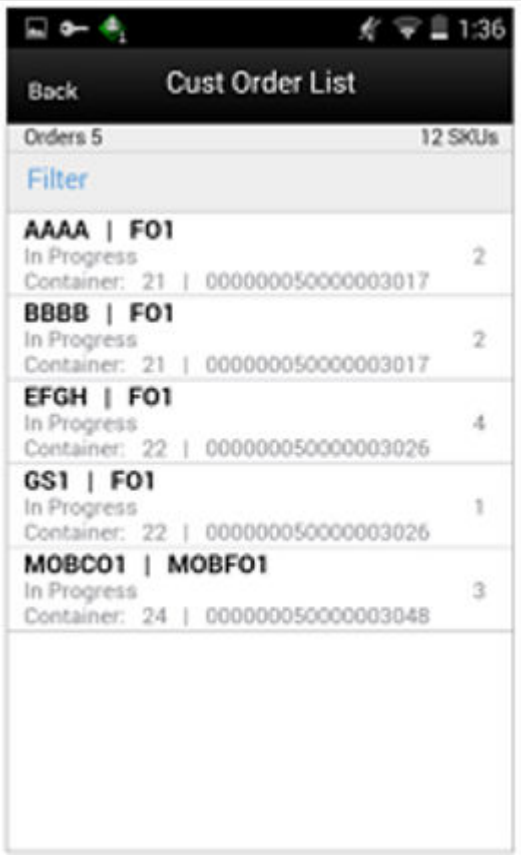
The filter can be used to narrow down the list of items. Filtering can occur by item ID and description.

The **Copy** button will copy all items from the container to a new container. A notification is sent to the original destination store to inform them the container intended for their location has been received in another location. The old container ID will be written into the reference container field for the newly created container and the old container will be moved to a 'Missing' status.

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Customer Order List

Figure 7-40 Cust Order List Screen



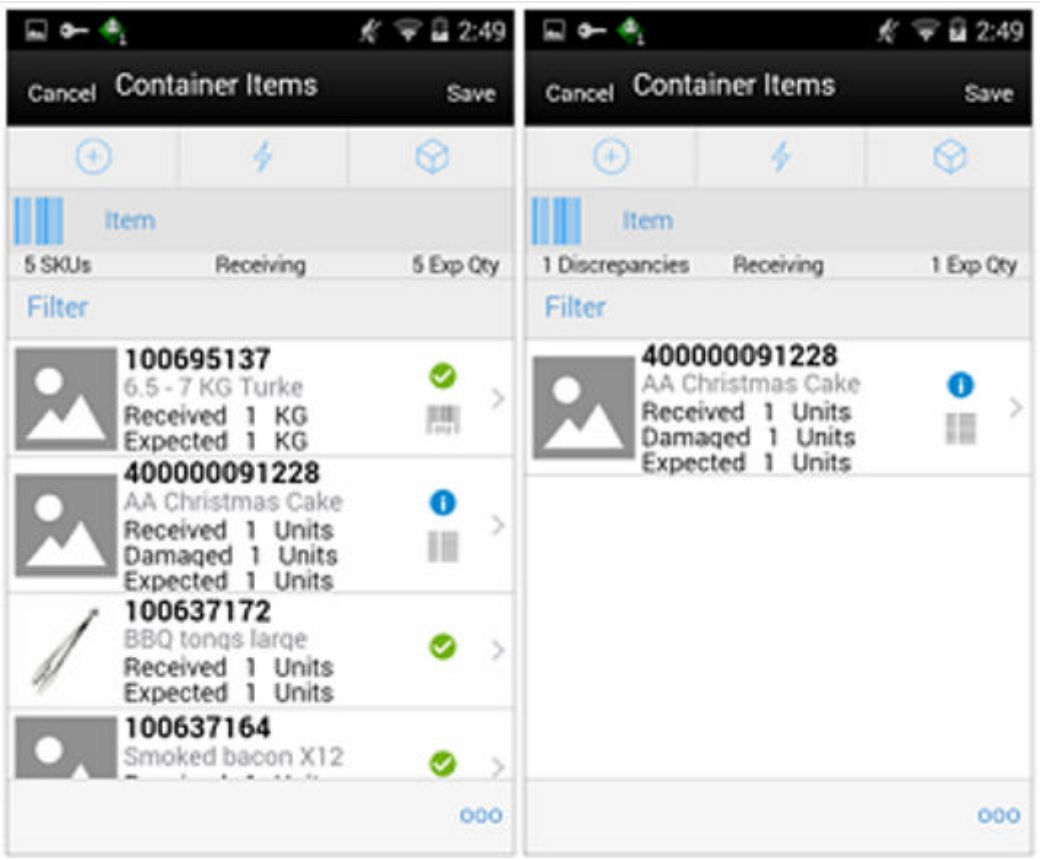
The Cust Ord List is an informational screen that contains read-only information about the customer orders within the receipt. Details include: Customer Order/Fulfillment Order, Status, Internal and External container ID.

Scrolling in the list of customer order/fulfillment orders on the left will display a filter. The filter can be used to narrow down the list of items. Filtering can occur by Customer Order ID, Fulfillment Order ID, Container ID, and Customer Order Status.

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Container Items

Figure 7-41 Container Items Screen



The Container Items screen is used when selecting a container to receive from the Tsf Rcv Containers screen.

This screen is used to work with the contents and details within the container. Information is populated from an Advanced Shipment Notice (ASN) and you mark the items as received or damaged. The items on the list are for the container. The item image for the line items is displayed per configuration.

If the **Non-Inventory** indicator of the item is **No**, the SOH of the item is updated at the completion of the transaction.

If the **Non-Inventory** indicator of the item is **Yes**, the item can be added to the transaction however, the SOH will not be updated on confirmation of the receipt. Item can be scanned/ added to the transaction, you can enter/update quantity just like a normal (inventory enabled) item. All the processing rules and validations that apply to inventory enabled items would apply for non-inventoried items too except that the validations done on quantity against SOH will be ignored. On confirmation of the receipt, the SOH of the item will not be updated since the application doesn't preserve the inventory details of the items with **Non-Inventory** set as **Yes**.

When the screen is set to regular receiving mode, the header bar will display the number of SKUs, 'Receiving', and total expected quantity. Scanning/entering an item will update the received quantity. When the screen is set to damage receiving mode, the header bar will

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display the number of SKUs, 'Damages', and total expected quantity. Scanning/entering an item will update the damaged quantity. Finally, when the screen is set to display only discrepancies, the number of discrepancies is displayed on the left.

Line items appear in a list and selecting a line item will navigate to the item details of the item. If an item has been changed in the current session, it will be indicated by a bar on the left of the item. The filter can be used to narrow down the list of items. Filtering can occur by Item ID, Description, Expected Qty, Received Qty, and Damaged Qty.

Scanning or entering an item in the scan bar will navigate you to the Item Detail screen for the item. If the user scans the Item ID of a UIN item or if he scans a UIN, he will be taken to the UIN tab of the Item Detail screen.

Quantity may be updated, depending on the scan mode.

The following icons will be displayed next to the item: green circle with check indicates the item is not discrepant and the blue circle with an 'i' indicates the item is discrepant. A discrepant item is when the received quantity plus the damaged quantity does not equal the expected quantity. If configured, unexpected items may be added to the container. A new transfer will be created for the unexpected items. There will only be one transfer created for the entire receipt.

The entire container may be marked as damaged and a reason for the damage from the Container Info screen. Additionally, the container can be marked to receive on the shopfloor directly.

Receive Transfer Delivery

When the delivery is being received, the status of the delivery/receipt will move to 'In Progress' status at the receiving store. Press the **Cancel** button and the delivery/receipt will remain as 'New'. If configured for blind receiving, the expected inbound quantities will not display.

You may select to use **Default Regular Qty** option or change the quantity received and mark items as damaged if necessary.

When confirming a delivery, the status is updated to Received and inventory is updated. The merchandising system is also notified at the container level for the receipt. This provides an up to date view.

When damaged items are received the inventory for those items will be put into a Non-sellable Unavailable bucket. The total received is the sum of the received and the damaged quantities.

Receive Entire Delivery

If the system parameter **Receive Entire Transfer** is set equal to **Yes**, you cannot add or remove items from a delivery.

Managing Discrepancies

Deliveries can be received for over, short or the exact quantity dispatched. Discrepancies are easily managed with the **Display Only Discrepancies** footer menu option. When selected, the expected qty will be compared with the received plus damaged qty and only the items with a discrepancy will display. Unexpected items added during the session will not show up on the discrepancy list since there is no expected quantity.

Store to Store transfer receipt overages will adjust the difference out of the sending store's stock on hand. There is not an inventory adjustment created for this overage but an e-mail notification will be generated and sent to the sending store.

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Adjust Container

After the delivery has been received, it is possible for a user to adjust each container on the receipt. This will depend on the **Number of Days** received transfers can be adjusted system parameter. Select the **Adjust** button and the container moves back to 'In Progress'. The entire container is reversed out and you will need to reconfirm. The full reversal will display in Transaction History.

Adjusting can only be done at the container level. The entire receipt cannot be adjusted at once. Once the original receipt has been confirmed, the inbound bucket will no longer see a change. In some cases, the container may be restricted from adjustments, such as when customer order reservations exist. If the container has been adjusted, a check box will be marked in the Container Info screen. The received quantity and damage quantity fields will be populated with the same value as when the container had been confirmed.

The ellipsis in the lower right hand corner will access the footer menu which will contain the functions that can be performed on a container.

Footer Menu

Info: Info will access the Info (Container) popup.

Notes: The Notes option accesses the notes common dialog to capture notes.

Default Regular Qty: Copies the expected quantity to the received quantity field.

Clear Qty: Clears the received quantity and damaged quantity fields for ALL items in order for you to start over.

Damage Mode: Scan/enter items and update the damage quantity field.

Regular Mode: Scan/enter items and update the received quantity field. This is the default mode.

Edit Container: Accesses the Edit Container screen.

Edit CFAs: Enter values for the CFAs that are set up for transfer deliveries - containers.

Adjust: Reopens a container in Completed status and moves it back to In Progress.

Damage Remaining Qty: Updates the remaining quantity not yet received to be applied to the damaged quantity field.

Display Only Discrepancies: Shows only the items with a received quantity plus damaged quantity that do not match the expected quantity.

Display All Items: Revert back after displaying only discrepancies. This is the default display.

Confirm: Moves the container in an 'In Progress' status to 'Received'.

Save: Saves the container in 'In Progress' status to be completed later. This option is only available when the screen is in edit mode.

When the container is saved, the UINs flagged as Received or Damaged and are not flagged to remove, the UIN status is updated to 'In Receiving'.

- If a UIN is flagged for removal, the UIN will be deleted if the UIN has a status of 'Unconfirmed' (this identifies the UIN as manually added).
- If a UIN is flagged for removal, the UIN receiving mode is removed if the UIN has any status other than 'Unconfirmed' (this identifies the UIN as pre-existing from an ASN).

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- If an item is flagged for removal, when you save the container and returns, the item will no longer exist in the container. Note: Only unexpected items added can be removed.
- If a UIN was relocated from another store:
  1. The UIN status is updated from In Stock to In Receiving.
  2. A notification is generated and sent to the store the UIN was relocated from.

Delete: Marks the container to 'Canceled' or 'Missing' status. If the container is from an external system, the container will be marked as 'Missing', otherwise, it will be marked as 'Canceled'. This option will only be available for containers that are in a 'New' or 'In Progress' status.

Cancel: Exits the container and changes made in that session will not be saved. This screen is only available when the screen is in edit mode.

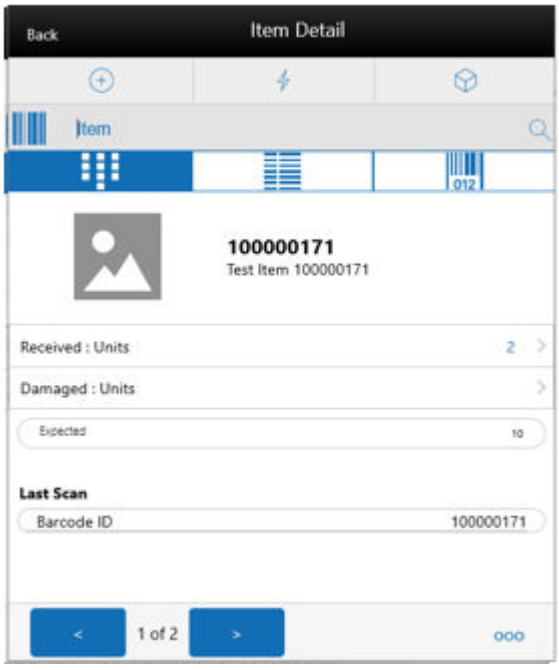
Back: Returns to the previous screen. This option is only available when the container is view only.

Print: Opens the print dialog and allows you to select formats and print various reports and container labels. The Transfer Receiving Container report will be available on this screen. This option will always be available regardless of the receipt or container status.

Print Tickets: Opens the Print Tickets dialog to print the tickets or labels for the current container items. This is described in common usage document with more details.

Item Detail

Figure 7-42 Item Detail (Container) Screen



The Item Detail screen is used when selecting or scanning an item from the Container Items screen. Scanning or entering an item on this screen in the scan bar will update the quantity per the scan mode and refresh the item detail screen for the item and quantity scanned. The quantity can be edited and updated manually if permissions allow. You can enter quantity for items with **Non Inventory** indicator as **Yes**.

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The item information including the image which is system configured to display in the header. The bottom portion of the screen contains information fields of inventory qty, remaining qty, document qty, and reason code (for unavailable inventory only) pertaining to the bucket stock is coming from. Lastly, the details of the last scanned barcode will be displayed.

The footer menu (ellipsis button), contains a **Reset** function as well as **Remove** and **Restore** functions. Page through existing item in the container view the arrows on the bottom. If the container is displaying only discrepancies, you will page through only the discrepant items.

If the user scans the Item ID of a UIN item or if he scans a UIN, he will be taken to the UIN tab within the Item Detail screen, for that item.

In the UIN tab the system displays all the UINs for the selected item, if the UINs were part of the ASN. Otherwise, the screen will remain blank until UINs are scanned/entered for the item.

When entering the screen for the first time, the status will display the following:

1. The UINs included on an incoming ASN will be displayed with a status of "Shipped to Store'.
2. The UINs manually added will be displayed with a status of "Unconfirmed", if they do not previously exist.
3. The UINs manually added may have another status, if they already exist in the system.

When re-entering this tab, the status will be updated to "In Receiving".

When the transaction is no longer editable, the screen will be in view only mode.

You will not have the ability to change the Receiving Mode for the UIN.

There is also an **Extended Attributes** tab that enables the user to view/capture Extended Attributes for the item. If the item is not configured to capture extended attributes or there are no extended attributes captured, the list will be empty.

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Edit Container

Figure 7-43 Edit Container Screen



The **Edit Container** screen is used to enter details for the container including transportation details. You navigate to this screen from the footer menu on the Container Items screen. Details include: Reference Container, Receive on Shopfloor, Damage Reason, SSCC, and Tracking ID.

The reference container field is used to identify the original container ID and will be filled in when you have copied a container from the **Misdirected Items** screen. If the container was manually created, you can enter the original container ID here.

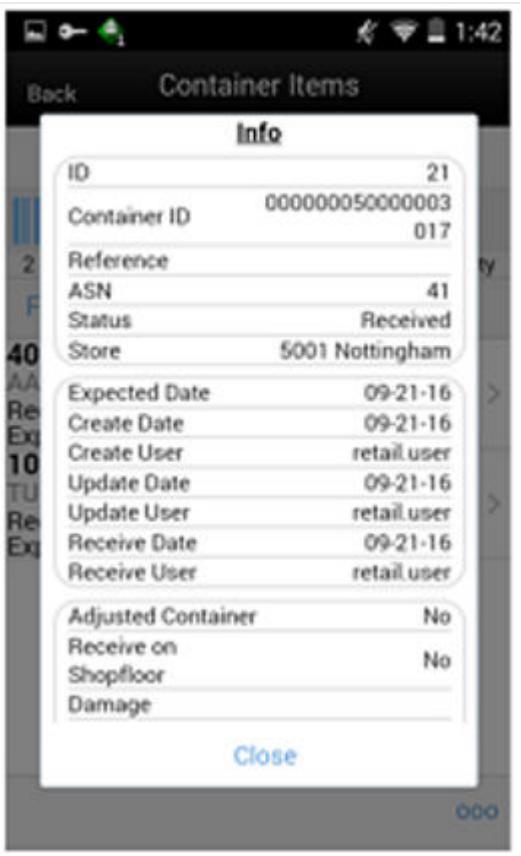
Receive on Shop Floor: The default will be based on the store parameter **Direct Delivery Default to Shop floor Receiving**. If set to **Yes**, the check box will default to marked.You are required to have **Receive Direct Delivery on Shop floor** permissions to change the value.This indicates whether the delivery will default to receive inventory into the shop floor instead of automatically receiving into the back room or delivery bay.If this is set to receive on shop floor, the system increments the shop floor inventory bucket instead of the backroom or delivery bay bucket. If a capacity is defined for the item and **Direct Delivery Receive Item Capacity** is set to **Yes**, the maximum shop floor quantity will equal the capacity; otherwise, the shop floor will be updated to the entire receipt amount. If the capacity is used and if the receiving quantity is excess, the balance is incremented to delivery bay or back room depending on the Replenishment - Delivery Bay Inventory parameter.If **Receive on Shopfloor** is not set on the delivery, the system increments the back room or delivery bay bucket depending on the Replenishment - Delivery Bay Inventory parameter. If this parameter is on,

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the system will increment the delivery bay bucket instead of back room. Regardless the stock on hand will be updated.The **Receive on Shopfloor** check box will only display for deliveries from a store or warehouse.For additional details, see In Store Replenishment.

Info (Container)

Figure 7-44 Info (Container) Popup

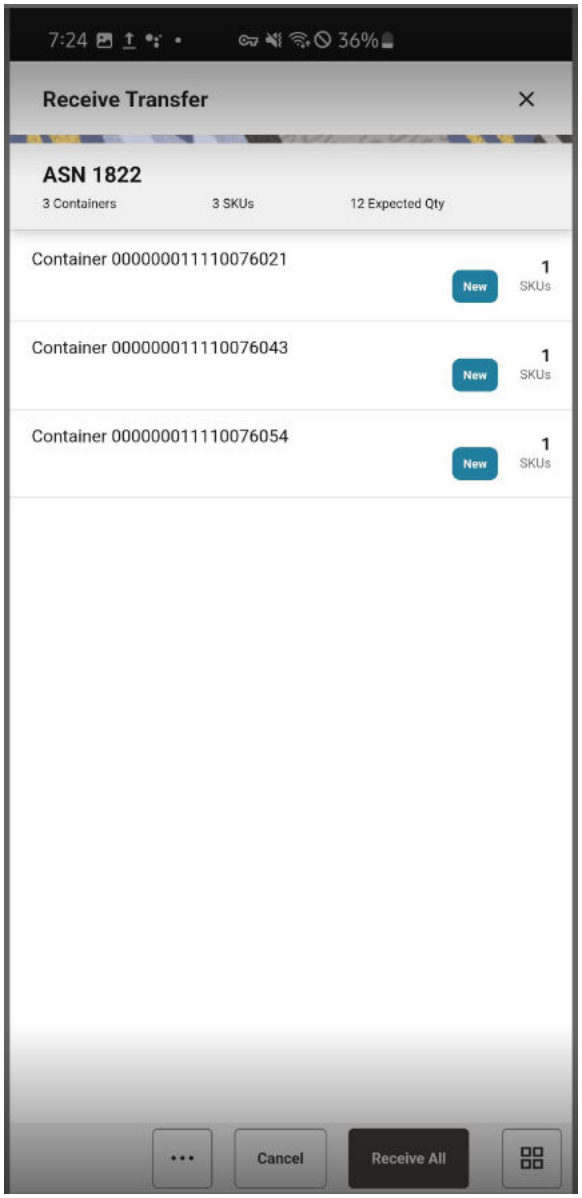


The Info (Container) is an informational popup that contains read only information about the header level of the container. Details include: ID, container ID, reference, ASN, status, source type and source, expected date, create date, create user, update date, update user, receive date, receive user, adjusted container, receive on shopfloor, damage reason, SSCC, tracking ID, and the CFAs.

Receive Transfer JET Mobile

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Figure 7-45 Receive Transfer Screen



In JET Mobile, the Receive Transfer screen is accessed by scanning/entering a Transfer Receiving record from the Open Transactions Screen with the status of 'New' or 'In Progress'. The Open transactions screen itself lists only the open transactions. The Transfer Receiving record can be a transfer from a store, finisher or warehouse to the user's store. The Receive Transfer screen will only allow for receiving the entire transfer, there will be no container or item level receiving.

This screen provides the following information about the transfer delivery:

ASN <X> — The ASN ID for the delivery/receipt.

<X> Containers - the number of containers on the ASN, where 'X' is the number.

<X> SKUs - the number of SKUs / line items on the ASN in all containers, where 'X' is the number.

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<X> Expected Qty - the total expected quantity for all line items on the ASN, where 'X' is the total. This will be the sum in SUOM across all the items.

List of containers:

- Container <X>- This field holds the identifier (external id) for the container printed on the container label.
- <CO/CO Mix> - This field will indicate whether customer order is associated for this container.
    1. CO-If all the items in the transfer are associated with a customer order.
    2. Blank- If there is no any item associated with a customer order.
    3. CO Mix- If the transfer contains items both with and without customer order associated with it.
- **Tracking ID** - This field displays the tracking id assigned to the container (if there is one).
- **<Status>** - This will display the status for the container. Values: New (Blue), In Progress (Blue), Missing (Red), Damaged (Red) and Received (Green
- **<X> SKUs** - This field holds the number of unique SKU's in the container.

Footer Menu

Print - will download the Transfer Receiving report information.

Information - the Information screen for the Transfer ASN will be displayed

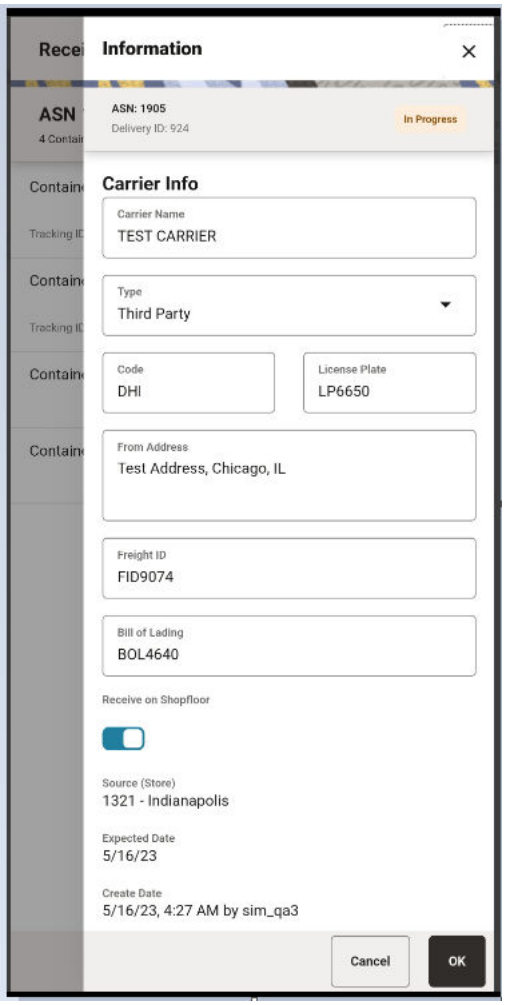
Receive All - Receives all the containers in the delivery

- The items will be received on shopfloor depending on the setting '<Source Type> to Shop floor Receive' setting. If the '<Source Type> Receive Item Capacity' is = Yes, and the container is being received on the shop floor, the capacity for the item will be considered and quantity above the capacity will update the backroom. Inventory buckets are updated. If there are CFAs set up which are mandatory, there will be no validation on whether a value has been entered or not, for mandatory CFAs.
- If any of the item in the delivery is an item with UINs associated to it, if the UINs were identified on the ASN (PRE-POPULATED) and the number of UINs in the ASN match the expected quantity, all the UINs that came on the ASN will be received and the status will be updated to 'In stock'. Otherwise, the item will not be received. If the item is an AGSN item, the UINs are auto generated post receiving.
- If the delivery is for a customer order and 'Reserve Customer Order Inventory on Receipt' store config is set to ‘Yes’, the system will update the customer reserved inventory bucket for the items on receipt. When the reservation happens on receipt, if 'Auto Pick on Receipt indicator' is set to ‘Yes’, the pick quantity is also updated automatically with the original requested quantity or the received quantity, whichever is less.

Information (JET Mobile)

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Figure 7-46 Information Panel (JET Mobile)



The Information screen can be accessed by clicking on the 'Information' option from the footer menu in the Receive Transfer screen. This screen enables the user to view information regarding the delivery and also lets the user to enter/edit information.

The details present in the screen include: Source Type, Source ID, ASN number, Delivery ID, Status, Expected Date, Create Date, Create User, Updated, Update User, Received, Received User, Carrier Name, Carrier Type, Carrier Code, License Plate, From Address, Freight ID, Bill of Lading, and the CFAs. The License Plate and Freight ID fields may be used for other purposes, such as a Weigh Bill ID or BOL ID. It may also include a field called 'Fiscal Doc ID'. This field would be a placeholder for the government reference ID for the delivery, if available.

CFAs can be entered values or edited through this screen if the user has Edit Delivery-CFA security permission.

The fields such as Carrier Name, Carrier Type, Carrier Code, License Plate, From Address, Freight ID, Bill of Lading, Receive on Shopfloor are editable if the user has ‘Edit Receipt’ security permission.

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Quick Receiving

The Quick Receiving dialog allows users to receive store, warehouse, and external finisher deliveries by scanning a container and marking the container as received immediately without scanning all the items within the container.

Quick Receiving features:

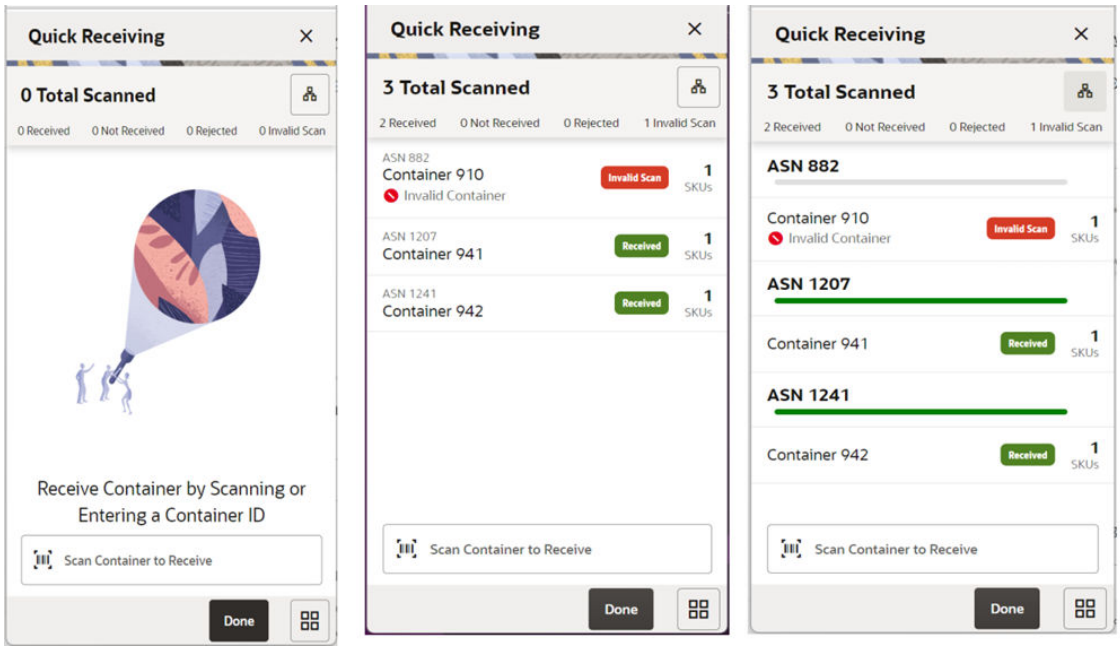
- Receive entire container
- Receive missing containers
- Automatic confirm receipt
- Multiple users scanning concurrently for same delivery

Mobile features:

- Receive missing and misdirected containers
- Update inventory immediately
- Captures containers scanned, received, rejected, and invalid scans

Quick Receiving (JET Mobile)

Figure 7-47 Quick Receiving Screens

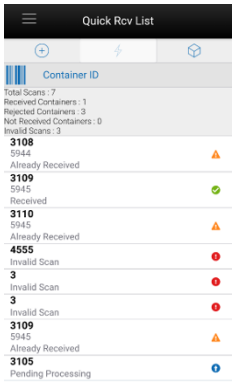


Quick Receiving is accessed by selecting Quick Receiving from the Drawer/Menu or from the Quick Actions screen for users with the correct permissions. User must have Access Quick Receiving permission. This screen allows for receiving of containers for Transfer delivery by scanning the Container ID.

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Quick Rcv List (MAF Mobile)

Figure 7-48 Quick Rcv List Screen



When navigating to Quick Receiving, you go to the **Quick Rcv List** screen. When you first go to this screen, an empty list will display. When scanning/entering a container ID in the scan bar the system searches for the container and will populate the list with the scanned value. Scan or enter the internal or external container IDs or the Tracking ID to find the matching shipments. The list will display anything that is scanned or entered including invalid scans.

The header of the screen list the number of containers that have been scanned/entered and their receiving status.

- **Total Scan**: Total number of containers scanned during the session.
- **Rcvd Containers**: Total number of containers that have been successfully received during the session.
- **Rejected Containers**: Total number of container rejected (previously received containers) during the session.
- I**nvalid Scans**: Total number of container scanned which are invalid during the session.
- **Not Received**: Total number of valid containers not received during the session. For example, when a misdirected container is scanned and not allowed to be received.

The following icons will be displayed to identify which scans are valid and which are in error:

- Green circle with check indicates the container is received.
- Orange triangle with exclamation point indicates the container was previously received.
- Red circle with exclamation point indicates the container ID scanned or entered is invalid or not received.
- Blue circle with up arrow indicates that the container scanned is pending processing.

Processing

Transfer Force Close Indicator

Transfer shortages will be adjusted based on the **Transfer Force Close Indicator** parameter settings NL, RL, or SL.

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This indicator is used to determine the processing of a transfer when there is a short receipt.

- **No Loss:** Sending store is incremented/decremented by the overage/shortage.

  No Loss Shortage: Shortage is added back to the sending store.

	Sending Store	Receiving Store
Beginning SOH	1000 SOH	1000 SOH, 0 In Transit
Sent qty 50	950 SOH	1000 SOH, 50 In Transit
Received qty 30 (shortage)	970 SOH	1030 SOH, 0 In Transit

- **Sending Loss:** For shortages, no perpetual inventory is sent back to the sending store. Sending store is financially responsible.

  > **Note**
  >
  > This is handled on the merchandising side.

  Sending Loss Shortage: Shortage is not added back.

	Sending Store	Receiving Store
Beginning SOH	1000 SOH	1000 SOH, 0 In Transit
Sent qty 50	950 SOH	1000 SOH, 50 In Transit
Received qty 30 (shortage)	950 SOH********	1030 SOH, 0 In Transit

- **Receiving Loss:** For shortages, no perpetual inventory is sent back to the sending store. Receiving store is financially responsible.

  > **Note**
  >
  > This is handled on the merchandising side.

  Receiving Loss Shortage: Shortage is not added back.

	Sending Store	Receiving Store
Beginning SOH	1000 SOH	1000 SOH, 0 In Transit
Sent qty 50	950 SOH	1000 SOH, 50 In Transit
Received qty 30 (shortage)	950 SOH********	1030 SOH, 0 In Transit

Available Versus Unavailable Inventory

When a transfer is saved, the system will move the items from either available or unavailable (non sellable) inventory, based on the inventory status, and move it to the reserved bucket within unavailable inventory. For warehouse and finisher returns, the Transfer Reserved bucket is updated. Upon dispatching of the transfer, the reserved buckets will be relieved and the stock on hand will be decremented. If sub-buckets are turned on, the appropriate sub-bucket associated with the shipment reason will be updated when transferring from unavailable inventory.

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Example 1: Transfer TO Warehouse using Available Inventory

Item Lookup before:

- Total SOH = 800
- Available = 700
- Unavailable = 100
- Nonsellable = 100 Sub-bucket: Trouble 75, Admin 25
- Reserved Qty = 0

1. Return Qty = 10 (Available), click Save.

   Item Lookup:

   - Total SOH = 800
   - Available = 690
   - Unavailable = 110
   - Nonsellable = 100 Sub-bucket: Trouble 75, Admin 25
   - Reserved Qty = 10

2. Modify Transfer Qty to 8, click Dispatch.

   Item Lookup:

   - Total SOH = 792
   - Available = 692
   - Unavailable = 100
   - Nonsellable = 100 Sub-bucket: Trouble 75, Admin 25
   - Reserved Qty = 0

3. Modify Return Qty to 8 and click Dispatch.

   Item Lookup:

   - Total SOH = 698
   - Available = 698
   - Unavailable = 0
   - Reserved Qty = 0

Inventory Position Updates - Transfer Documents using Available Inventory

- Approving a Transfer (All) :
  - Transfer Reserved (+)
  - Available SOH (-)
- Confirming a Container with a Transfer Document created on the fly:
  - Transfer Reserved (+)
  - Available SOH (-)
- Confirming a Container with a Transfer Document previously created:
  - No changes

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- Dispatching a Shipment:
  - Transfer Reserved (-)
  - Total SOH (-)
  - In bound Qty (+) for Receiving Store
- Confirming a Container at Receiving Store:
  - Available SOH (+)
  - Inbound Qty (-)
- Confirming a Container at Receiving Store with Damages:
  - Unavailable (+):
    - Sub-bucket (+)

> **Note**
>
> Assumes Shipping Qty is less than or equal to Approved Transfer Document Qty.

Inventory Position Updates - Transfer Documents Using Unavailable Inventory

- Approving a Requested Transfer Document:
  - Transfer Reserve (+)
  - Total SOH (no change)
  - Nonsellable (-):
    - Sub-bucket (no change)
- Confirming a Container with a Transfer Document previously created:
  - Transfer Reserve (no change)
  - Nonsellable (no change):
    - Sub-bucket (-)
- Dispatching a Shipment:
  - Transfer Reserve (no change)
  - Total SOH (-)
  - In bound Qty (+) at Receiving Store
- Confirming a Container at Receiving Store:
  - Unavailable (+):
    - Sub-bucket (+)
  - In bound Qty (-) at Receiving Store

> **Note**
>
> Assumes Shipping Qty less than or equal to Approved Transfer Document Qty; No Transfer Documents created on the fly allowed.

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Transfer Document (JET Mobile)

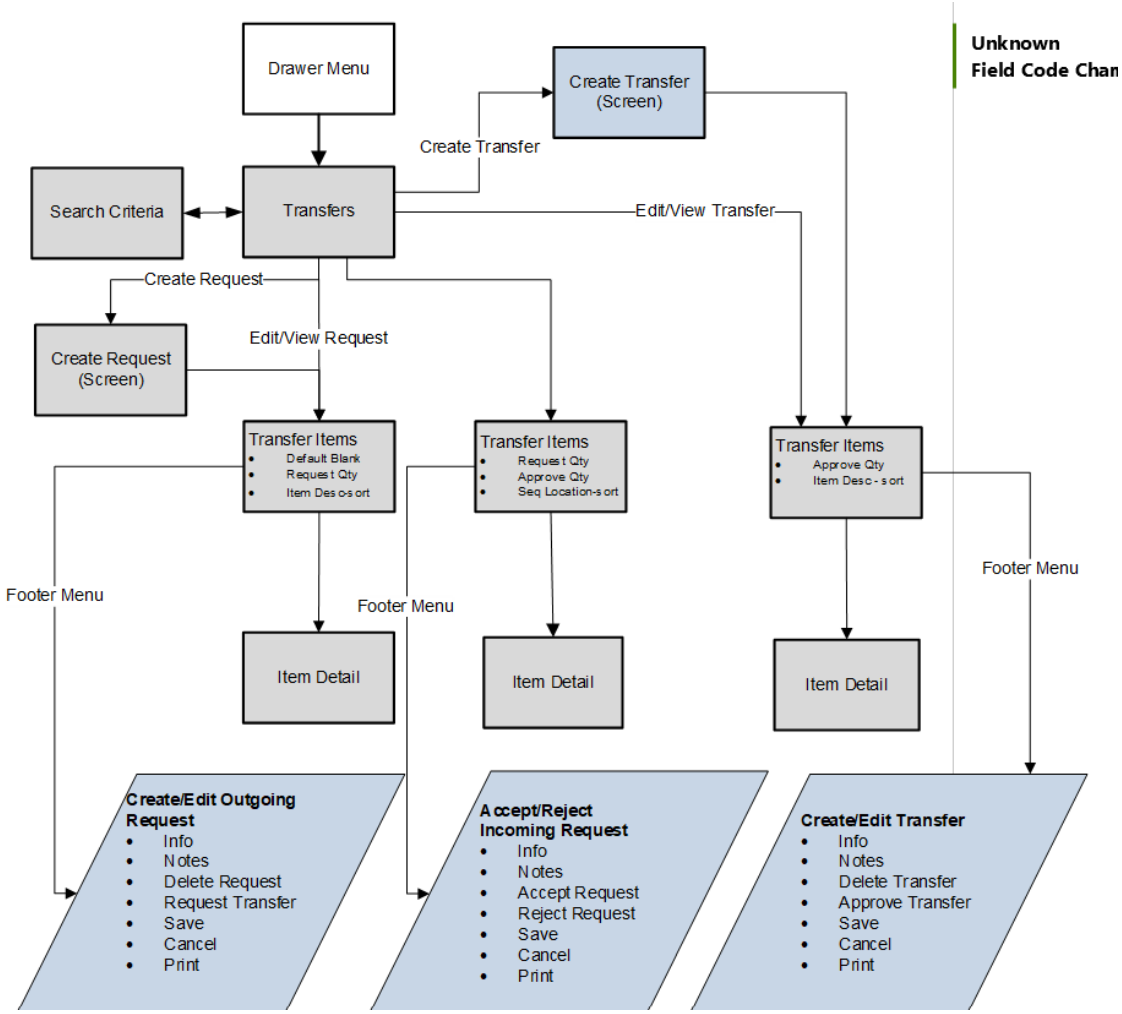
The Transfer Document dialog allows you to create transfer requests requesting items from a store, accept and reject transfer requests from a store as well as create and approve transfer documents to ship items to warehouse, store and external finisher in a single dialog.

Transfer Document features:

- Creation of transfer documents to allow the movement of goods between stores or from a store to a warehouse or external finisher.
- Creation of transfer requests from a store to another store requesting for movement of goods. The sending store will have the ability to either accept the request of reject it.
- Transfer requests created externally can be accepted or rejected.
- A flow exists to pick items for the transfer document.
- Transfers can be done from both available and unavailable inventory.
- Visibility of shipment and receipt values after transfer approval.
- View Transfer Documents and Requests for Transfer
- Look up Shipping and Receiving Details
- Close a Transfer
- Capture values for CFAs (Custom Flexible Attributes)
- Print Reports
- This will also be a placeholder for Stock Order messages from external system for Store, Warehouse and Finisher deliveries.

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Figure 7-49 Transfer Mobile Screen Flow



Destination Types

Transfer Shipment to Store (Store to Store):

To create a Store Transfer Shipment, the destination type of 'Store' must first be identified for the shipment. The system provides a list of valid store locations. User can do a lookup as well.

Transfer Shipment to Warehouse and to Finisher:

To transfer items to a warehouse, the destination type of 'Warehouse' must first be chosen for the shipment. The system provides a list of valid warehouses. For a transfer to Finisher, select a destination type of 'Finisher' and select the destination for the shipment, or search for it using the lookup widget. Finishers are restricted to those which are for the same organization unit as the store.

Customer Orders

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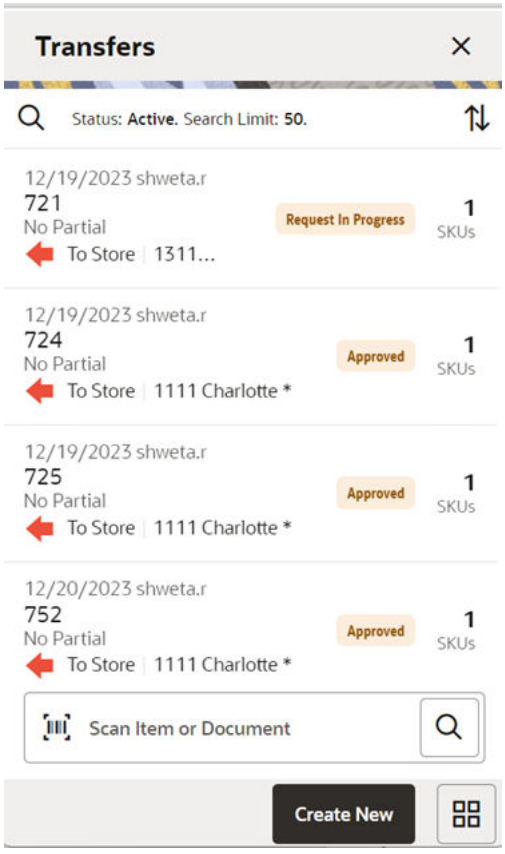
Transfer requests can come from the merchandising system to request goods from one store to another store that are for a customer order. These transfer requests will appear in the Transfer dialog.

There will be a customer order indicator on the transfer to denote that the transfer has a customer order affiliated with it. When searching for a transfer using the filter, you can search for those transfers that are for customer orders, or search for a transfer that contains a specific customer order ID and fulfillment order ID.

The Info screen will display the specific customer order and fulfillment order ID for that transfer if there is one. Allow Partial Delivery is populated based upon the customer order or the system can be configured to not allow partial customer order transfer shipments. If Allow Partial Delivery is not on, then, when accepting a transfer request, you must accept the full amount being requested. If system parameter Customer Order Fulfillment Restriction is set to Line Controlled, for transfer requests associated with a customer order, any item getting approved should get approved completely.

Transfers

Figure 7-50 Transfers List Screen



When navigating to Transfers from drawer menu->Shipping & Receiving or from Quick Actions, you go to the Transfers screen, which lists the inbound and outbound transfer requests and documents for your store.

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The user must have 'Access Transfer' security permission to access this screen. This screen displays 'Active' transfers by default. User can click on a Transfer record and the system will take the user to the Transfer Items screen.

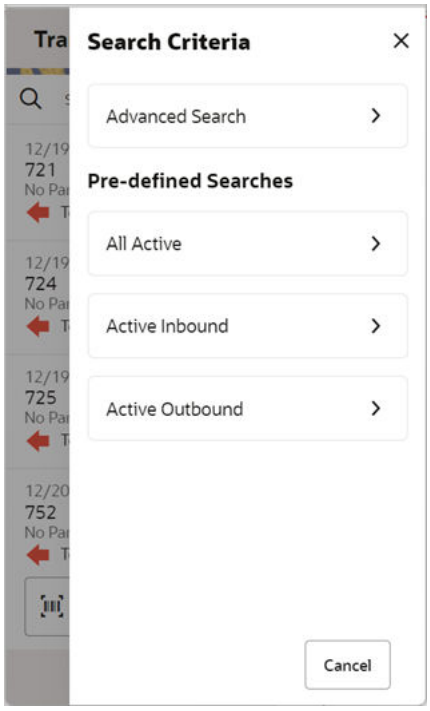
The records in the Transfer List screen are sorted in the following manner by default when the user enters the screen:

- The Outbound records are listed first, and within the outbound records, the records are sorted by Not After Date, lowest Not After Date to highest.
- The Inbound records are listed after the Outbound records and within the inbound records, the records are sorted by Not After Date, lowest Not After Date to highest.

In addition, the user has been provided with different options to sort - by Transfer ID, Newest or Oldest based on Create Date of transfer.

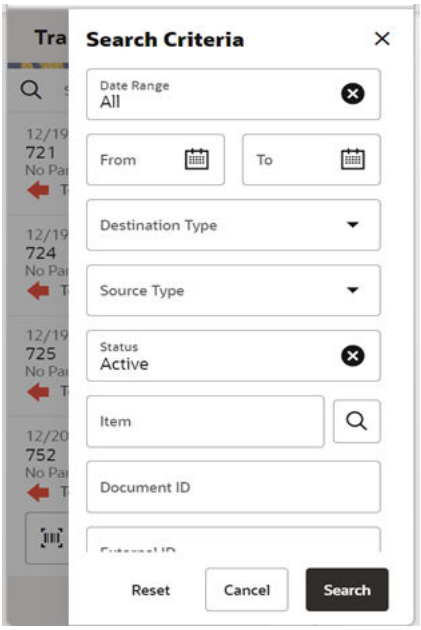
Search Criteria

Figure 7-51 Search Criteria Screen 1



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Figure 7-52 Search Criteria Screen 2



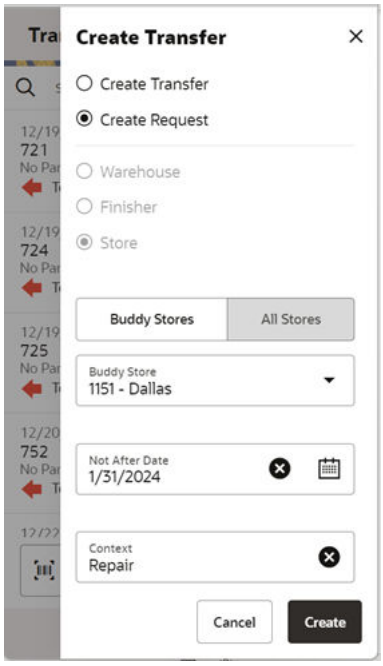
The Transfer Search Criteria Screen is accessed by clicking on the magnifying glasses on the Transfers screen. After applying the search criteria, the results are listed on the Transfers screen and the criteria applied is also shown. The search results must have the current store as either the Source or Destination location. To enable users to search for a transfer(s), there are two ways available:

1. Pre-defined searches – These are search criteria pre-defined within the system which can be used to quickly narrow down the list of records without having to go to the Search Criteria screen and use various search criteria. The options include 1. All Active 2. Active Inbound 3. Active Outbound.
2. Advanced Search – Clicking on this option will present the user with various search criteria in the Search Criteria screen. Some of the search criteria include Source and Destination types, Item ID, Document ID, Status, Customer Order/Fulfilment Order ID, Last Update Date range(pre-defined and user entered), etc. Users can also search for only the transfers that are associated with customer order.

Create Request

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Figure 7-53 Create Transfer(Request) Drawer



A request is created from the Transfers screen by clicking on ‘Create New’ button and selecting ‘Create Request’ option, when a store wants to receive items from another store. The user must have ‘Create Request’ security permission to create a new request.

A request can be generated from an external system or be created in the mobile application. If the request has been created in the mobile application, then Source Type can only be a Store. A store cannot create a transfer requesting for items from a warehouse or a finisher.

The request can only be created if the store creating the request is in the same transfer zone as the source store or from a null transfer zone. Also the requesting store should not be an excluded store for the Source store, that is, the requesting store must be in the shipping network of the source store in order to request items from a store. However, if the user has ‘Override Exclude Shipping Network’ security permission, they can proceed with creating the request. A store's shipping network is setup through the 'Store Shipping Network' screen in the desktop application.

The user can select the source store either through the Buddy Stores tab or All Stores tab. In the Buddy Stores tab, system will automatically list only the buddy stores set up for the store you are logged into. However, any other store can also be searched and selected from the All Stores tab.

If the store requesting items wants the items before a certain date, a date can be selected or typed into the Not After Date field. The request will automatically cancel if not accepted by this date. There are notifications in place to ensure the transaction is fulfilled in time, if configured.

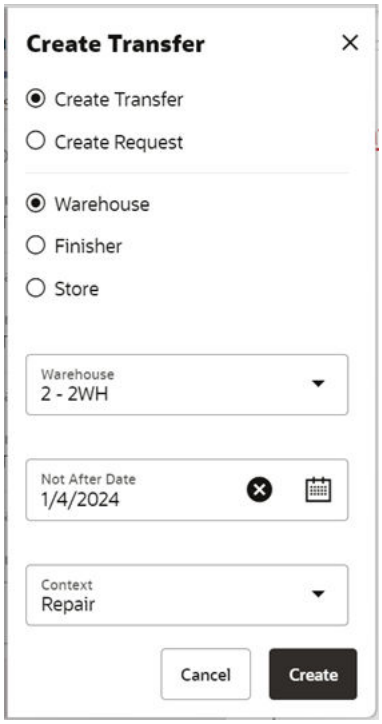
The user can choose a Context Type and enter a Context value as well. Context Value can be specified for all Context Types.

The request needs to be accepted by the other store before a transfer can be shipped. Once accepted, the transfer document can be used to restrict or default items in a shipment/ container.

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Create Transfer

Figure 7-54 Create Transfer Popup



A transfer document is created from the Transfers screen by clicking on the ‘Create New’ button and selecting the ‘Create Transfer’ option, when a store wants to send items to another entity. A store can create a transfer to another store, a warehouse or to a finisher.

The user must have ‘Create Transfer’ security permission to create a new transfer.

In case of store to store transfers, the transfer can only be created if the destination store is in the same transfer zone as the source store or from a null transfer zone. Also, the destination store should not be an excluded store for the Source store. However, if the user has ‘Override Exclude Shipping Network - Store’ security permission, he can proceed with creating the transfer. A store's shipping network is setup through the 'Store Shipping Network' screen in the desktop application.

The user can select the destination store either through the Buddy Stores tab or All Stores tab. In the Buddy Stores tab, the system will automatically list only the buddy stores set up for the store you are logged into. However, any other store can also be searched and selected from the All Stores tab.

In case of store to warehouse transfers, a transfer can only be created if the destination warehouse is not excluded for return for the Source store. However, if the user has ‘Override Exclude Shipping Network - Warehouse’ security permission, he can proceed with creating the transfer to an excluded warehouse. For a user without this permission, the warehouse dropdown values are limited to the warehouses that are not excluded. A store's warehouse shipping network is setup through webservices.

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For users with override permission, a validation is done on ‘Create‘ button to confirm if the user wants to proceed with creating a transfer to an excluded store or a warehouse.

‘Not After Date’ field will need to be set if the source store wants the items to be shipped by a specific date.

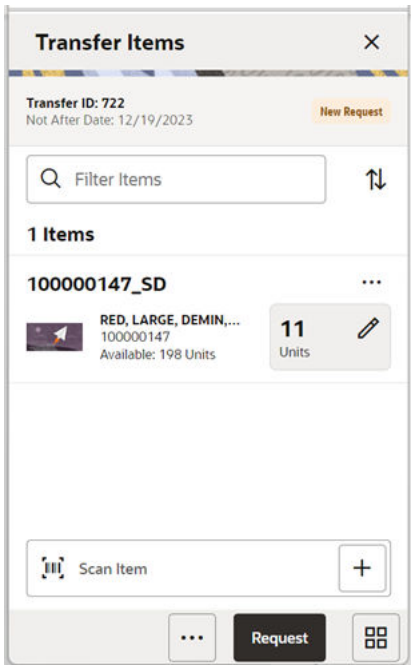
The user can choose a Context Type and enter a Context value as well. Context Value can be specified for all Context Types.

You will be able to create transfer for ‘Unavailable‘ inventory only if you have 'Create Unavailable Transfer Documents' security permission.

The transfer needs to be approved at the source store for it to be shipped.

Transfer Items (Request)

Figure 7-55 Transfer Items Screen



The Transfer Items screen is used when creating a new request which allows the requesting store to ask for items from another store. Initially this screen will not have any items. The user can add items to the request by scanning/entering the Item ID in the scan bar. This screen is also displayed when selecting a saved request from the Transfers screen. The items that have been added to the transfer request are listed in this screen. The item image for the line items is displayed per configuration done in the User Preferences.

Line items appear in a list and the user can update the request quantity for the items in the list or navigate to the item detail of that item by selecting the item. The user can also add new items to the list. This screen also displays a filter. The filter can be used to narrow down the list of items. Filtering can occur by item ID and description. The filter disappears when you scroll down through the list of items.

Items with Non-Inventory set as Yes are also allowed to be added to the request.

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On scanning or entering an item in the scan bar, the user will either stay on the screen or go to the Item Detail based upon the Scan Navigation user preference. Quantity may be updated depending on the scan mode. The item must be unique on the transfer.

The ellipsis in the lower right-hand corner accesses the footer menu which contains all of the functions that can be performed on a transfer request.

Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Request Items screen. The menu functions include the following:

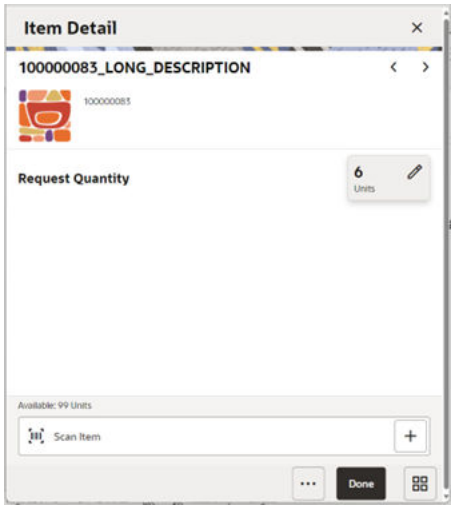
- **Info**: Accesses the Info popup. Lets you enter values for the CFAs that are set up for Transfer documents. Also, the screen will allow you to enter Context Type, Context Value, Not After Date, and so on.
- **Notes**: The Notes option accesses the notes common dialog to capture notes.
- **Save**: Saves changes without requesting the transfer.
- **Delete**: Deletes the transfer before it is requested.
- **Cancel**: Leave the screen without saving any changes.
- **Back**: Return to previous screen. Available only in view mode.
- **Print**: Opens the print dialog and allows you to print reports. This option will always be available regardless of the transfer status.

Footer Button

Request: Allows you to request the transfer. The Transfer status is updated to Requested and it will appear in the source store. A notification is sent to the source store if configured. If the store parameter 'Context Type/Value required for Transfer' is set to 'Yes', a validation is done at this point to check if the Context Type/Value has been entered for the transfer.

Item Detail (Create/Edit/View Request)

Figure 7-56 Item Detail Screen (Requested Quantity)



The Item Detail screen is used when selecting or scanning (when set by User preference) an item from the Transfer Items screen of a request in the requesting store. Scanning or entering

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an item on this screen in the scan bar updates the quantity per the scan mode and refreshes the Item Detail screen for the item and quantity scanned. You can enter the quantity to be requested for the items.

The quantity can be edited and updated manually if permissions allow. The system validates whether the item that is getting requested has enough inventory at the sending store. If the sending store doesn't have enough available inventory for the item, a soft warning is displayed. If the sending store doesn't have enough unavailable inventory for the item, an error is displayed. A transfer request created in the mobile application can request the item from both the available and unavailable inventor similar to a transfer request created in an external system.

Items with **Non-Inventory** set as **Yes** are also allowed to be added to the request.

The item information including the image (which is system configured) display in the header. The screen contains fields for entering the quantity being requested, pack size of the item if the **UOM** mode is Cases and a field that displays the SOH of the item in the sending store. The details of the last scanned barcode will be displayed at the top. You can page through existing items on the request using the arrows on the header.

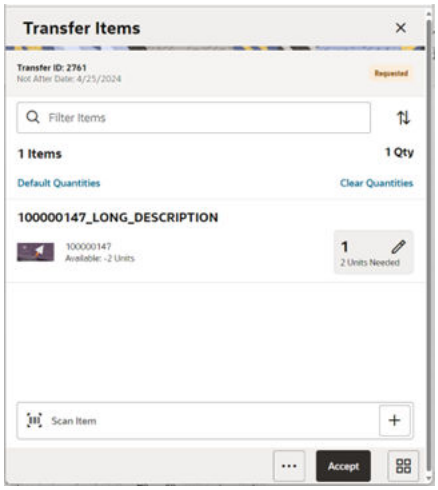
The footer menu, ellipsis button, contains a Delete option to remove the item from the transaction.

Transfer Items (Accept/Reject Request)

Accepting/Picking Request

Once the requested transfer is created by the receiving store or in the merchandising system, the user on the shipping side of the transfer can enter approved quantities or pick items and set them aside for eventual shipment. Once the quantities are entered or picking is completed, the transfer moves to an Approved status.

Figure 7-57 Transfer Items Screen



The Transfer Items screen is displayed when opening a transfer request from the Transfers screen in the requested store (source store). This screen enables you to pick and approve the quantities to ship, for the requested items. This screen will display the items that have been requested. The item image for the line items is displayed per configuration.

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Line items appear in a list and selecting a line item navigates to the item details of that item. This screen also displays a filter. The filter can be used to narrow down the list of items. Filtering can occur by item ID and description. The filter disappears when you scroll down through the list of items.

Default Quantities: Allows you to default the requested quantity to the Approved quantity field for all the items in the transfer.

Clear Quantities: Clicking this option makes the Approved qty to NULL for all items on the transfer.

On scanning or entering an item in the scan bar, the user will either stay on the screen or go to the Item Detail based upon the Scan Navigation user preference. Quantity may be updated depending on the scan mode.

Items with Non-Inventory as Yes are also allowed to be in the transaction and you can enter approved quantity for these items.

You can add unexpected items to ship along with the requested items if the following conditions are met:

- You have the necessary ‘Add Item to Transfer Request‘ security permission.
- The transfer is in edit mode.
- There is no customer order/fulfilment order associated with the transfer.

The ellipsis in the lower right hand corner accesses the footer menu which contains all of the functions that can be performed in this screen.

Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Transfer Items screen. The menu functions include the following:

- **Info**: Accesses the Info popup. Lets you enter values for the CFAs that are set up for Transfer documents. Also, the screen will allow you to enter Context Type, Context Value, Not After Date, Allow Partial Delivery indicator and so on.
- **Notes**: The Notes option accesses the notes common dialog to capture notes
- **Create Shipment**: This option enables the user to create a shipment for the transfer. Security permission is needed for this option to be displayed.
- **Reject:** Rejects the transfer request.
- **Save and Exit**: Saves the changes made to the transfer and exits the screen ad takes the user to Transfers screen.
- **Close Transfer**: Closes the transfer when certain conditions are met. Reverses the reserved inventory if any. Security permission is needed for this option to be displayed.
- **Cancel**: Leaves the screen without saving any changes. This option is available when the transfer is in edit mode.
- **Back**: Returns to the previous screen. This option is available when the transfer is in view mode.
- **Print**: Opens the print dialog and allows you to print reports. This option will always be available regardless of the transfer status.

Footer Button

Accept: Accept to ship the items requested by the requesting store. For store to store transfer requests created within SIOCS,before accepting the transfer, the system should validate to

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ensure that the destination store is not an excluded store for the source store. However, if the user has **Override Exclude Closed Stores – Store security permission**, the system allows the user to proceed if he wants to.

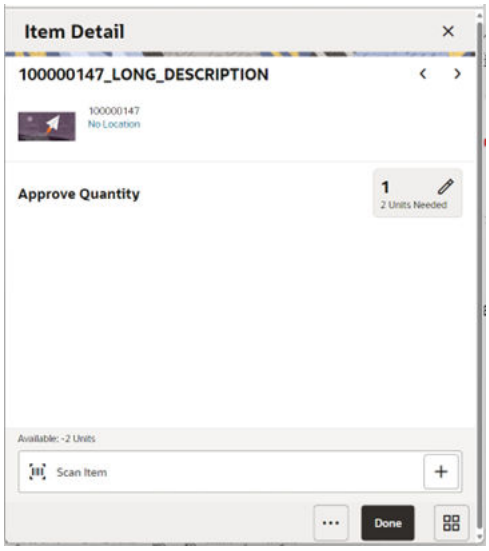
If the destination is a warehouse, the user should be allowed to "Accept" the Store to Warehouse transfer request even if the warehouse is an excluded warehouse to the source store.

All corporate created transfer requests should be allowed to be accepted irrespective of the exclusions, for both store to store and store to warehouse transfer requests.

If the system parameter **Customer Order Fulfillment Restriction** is set to **Line Controlled**, for transfer requests associated with a customer order, any item that is being approved should be approved in its entirety. The validation on mandatory CFAs is also done here. The user can choose to create a shipment immediately on accept if he wants to and if he has the security permission to do so.

Item Detail (Accept/Reject Request)

Figure 7-58 Item Detail Screen (Approved Quantity)



The Item Detail screen is displayed when selecting or scanning an item from the Transfer Items screen of a transfer request in the sending store. Scanning or entering an item on this screen in the scan bar updates the quantity per the scan mode and refreshes the Item Detail screen for the item and quantity scanned. You can enter the approved quantity for the items that have been requested by another store.

You can add unexpected items to ship along with the requested items if the following conditions are met:

- You have the necessary ‘Add Item to Transfer Request‘ security permission.
- The transfer is in edit mode.
- There is no customer order/fulfilment order associated with the transfer.

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The quantity can be edited and updated manually if permissions allow. Items with **Non-Inventory** set as **Yes** are also allowed to be in the transaction and you can enter approved quantity for these items.

The item information including the image (which is system configured) display in the header. The screen contains fields for entering the quantity being approved, pack size of the item if the UOM mode is Cases, Primary Location where the item is present if sequencing has been done for the item, field that displays the requested quantity of the item, a field that displays the available/unavailable quantity depending on the inventory bucket from where the item has to be picked. This screen also displays certain fields depending on the status of the transfer. For example, In Shipping field is displayed if the transfer is in 'In Shipping' status.

Received and Damaged quantity fields are displayed if the transfer is getting received at the requesting store. You can view the list of locations where the item is available (if sequenced) to help you to pick the items faster. The details of the last scanned barcode will be displayed at the top.

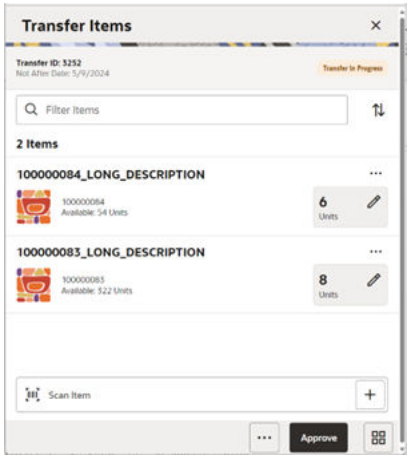
The footer menu, ellipsis button, contains a Delete function to enable the user to remove an item. You can also page through existing items on the transfer using the arrows on the header.

Transfer Items

Creating/Approving a Transfer

The user will go to the Transfer Items Screen after the user has created the transfer, by selecting the Create New button from the Transfers screen and selecting to create a transfer or selecting a transfer from the Transfers screen that is in 'Transfer In Progress' status. The user can add items and the corresponding ship quantity that he wants to ship to another store and approve the transfer which will be eventually shipped .

Figure 7-59 Transfer Items Screen



This screen will display the items that have been added to the transfer. The item image for the line items is displayed per configuration.

Line items appear in a list and selecting a line item navigates to the item details of that item. This screen also displays a filter. The filter can be used to narrow down the list of items. Filtering can occur by item ID and description. The filter disappears when you scroll down through the list of items. The user can view the current inventory available for the item which

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helps the user to understand how much can be sent to another store. Pack size can be edited as well.

On scanning or entering an item in the scan bar, the user will either stay on the screen or go to the Item Detail based upon the Scan Navigation user preference. Quantity may be updated depending on the scan mode.

Items with **Non-Inventory** as **Yes** are also allowed to be in the transaction and you can enter approved quantity for these items.

The ellipsis in the lower right hand corner accesses the footer menu which contains all of the functions that can be performed in this screen.

Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Transfer Items screen. The menu functions include the following:

- **Info**: Accesses the Info popup. Lets you enter values for the CFAs that are set up for Transfer documents. Also, the screen will allow you to enter Context Type, Context Value, Not After Date, Allow Partial Delivery indicator and so on.
- **Notes**: The Notes option accesses the notes common dialog to capture notes
- **Create Shipment**: This option enables the user to create a shipment for the transfer. Security permission is needed for this option to be displayed.
- **Save and Exit**: Saves the changes made to the transfer and exits the screen ad takes the user to Transfers screen.
- **Close Transfer**: Closes the transfer when certain conditions are met. Reverses the reserved inventory if any. Security permission is needed for this option to be displayed.
- **Cancel**: Leaves the screen without saving any changes. This option is available when the transfer is in edit mode.
- **Back**: Returns to the previous screen. This option is available when the transfer is in view mode.
- **Print**: Opens the print dialog and allows you to print reports. This option will always be available regardless of the transfer status.

Footer Button

Approve: Enables the user to approve to ship the items to another store. Before approving the transfer, the system should validate to ensure that the destination store is not an excluded store for the source store. However, if the user has **Override Exclude Closed Stores – Store security permission**, the system allows the user to proceed if he wants to.

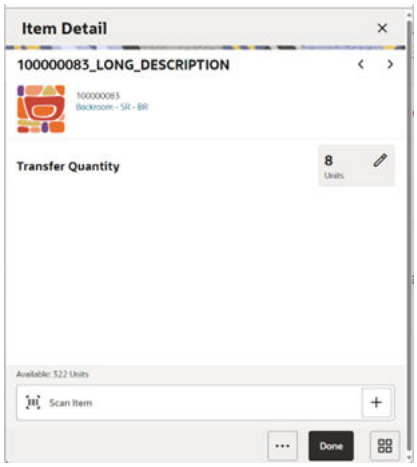
For a store to warehouse transfer created within SIOCS, before approving the transfer, the system should validate to ensure that the destination warehouse is not an excluded warehouse for the source store. However, if the user has **Override Exclude Closed Stores – Warehouse security permission**, the system allows the user to proceed if he wants to.

The validation on mandatory CFAs, Context type are also done here. The user can choose to create a shipment immediately on approve if he wants to and if he has the security permission to do so.

Item Detail (Create/Edit/View Transfer)

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Figure 7-60 Item Detail Screen (Approved Quantity)



The Item Detail screen is used when selecting or scanning(when set by User preference) an item from the Transfer Items screen of a transfer in the sending store. This is of a transfer that the sending store has directly created in order to ship items to another store. Scanning or entering an item on this screen in the scan bar updates the quantity per the scan mode and refreshes the Item Detail screen for the item and quantity scanned. You can enter the quantity that is approved to be shipped for the items.

The quantity can be edited and updated manually if permissions allow. The system validates whether the item has enough inventory at the sending store. If the sending store doesn't have enough available inventory for the item, a soft warning is displayed. If the sending store doesn't have enough unavailable inventory for the item, an error is displayed.

Items with **Non-Inventory** set as **Yes** are also allowed to be added to the transfer.

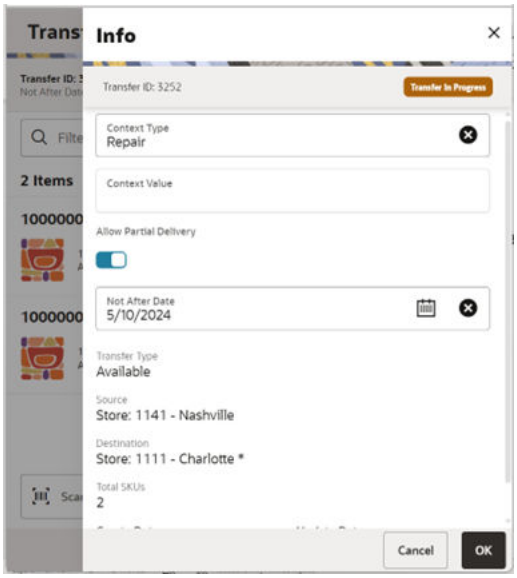
The item information including the image (which is system configured) display in the header. The screen contains fields for entering the quantity being approved, pack size of the item if the UOM mode is Cases and a field that displays the SOH of the item in the sending store. The details of the last scanned barcode will be displayed at the top. You can page through existing items on the request using the arrows on the header.

The footer menu ellipsis button contains a Delete option to remove the item from the transaction.

Info Screen

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Figure 7-61 Info Screen



The Info screen is an informational popup that contains a few read-only and editable information about the header level of the transfer. The screen is accessed by clicking on Info footer menu option from the Transfer Items screen. The list of fields is dependent on the status of the transfer. Details include Transfer Document ID, External Transfer Document ID, Source/Destination Type, Source/Destination ID, Status, Context Type and Context value, Inventory bucket information (Available or Unavailable), Allow Partial Delivery indicator, Customer Order/Fulfilment Order info, Request Date/User, Create Date/User, Approve Date and Approval User, Close/Reject Date/User and the CFAs.

> **Note**
>
> A transfer document can only contain available or unavailable inventory. The selection of this has to be completed before adding the first item. After the first item is added, the available/unavailable option will be locked down.

The Info screen displays the list of CFAs (flexible attributes) that have been set up for Transfer Documents, in the desktop application and lets you enter values for them. The CFAs that are set up as 'Required' must have a value entered for it before creating/accepting the transfer. Appropriate security permission is needed and the transaction must be in editable status for entering CFA values. For Transfers, the CFAs can be captured for the same transfer in both destination and source stores while creating and approving request respectively. In this case, same set of CFAs will be available at both the stores. The CFAs captured during request create will be available in the screen of request approve along with the values captured and the values can be overridden.

This screen allows you to edit certain information of the transfer request like Context Type/Value, Not After Date, Allow Partial Delivery (Y/N). You need appropriate permission to edit these fields and this screen is available only when the transfer request is in 'New request' status.

A context type and value can be entered if necessary. The context type is used to give a reason or purpose for the request. For context types of 'PROM(Promotion)', the Context Value field will be displayed and a promo ID will need to be entered. If the promo ID exists, the

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description for the promotion will be displayed. If the promotion ID does not exist in the system the description displays as 'Unknown'.

Transfer Shipping (JET Mobile)

The Transfer Shipping dialog is focused on shipping out items using a container or not using a container, depending on the retailer’s business process. Each shipment can be associated to one or more complete or partial transfer documents. The shipment/Containers(if applicable) can also be restricted to specific merchandise hierarchies to prevent mixing of items.

Transfer Shipment features:

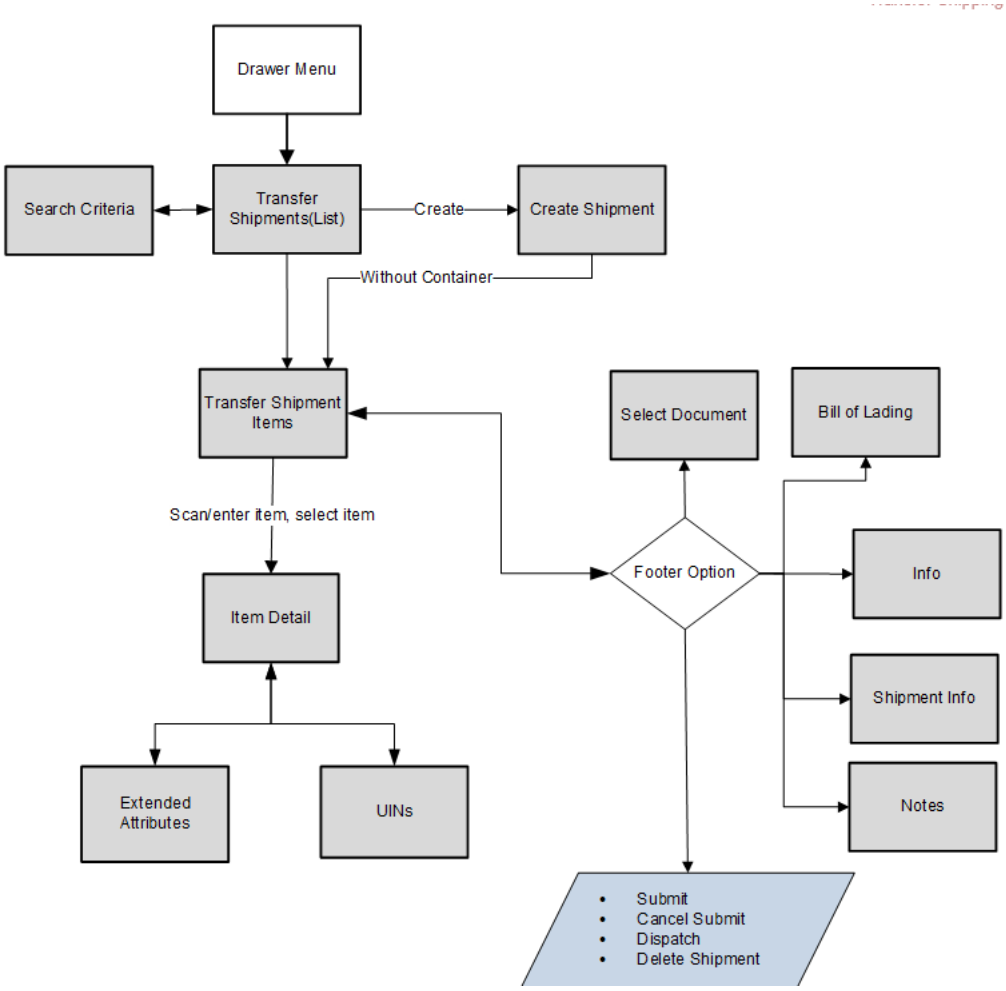
- Supports shipping to the store, warehouse, or external finisher
- Creating shipments without containers, with/without referencing transfer documents (on the fly)
- Multiple transfer documents allowed in a single shipment (without container)
- Create container without referencing a transfer document (on the fly)
- Limit store selection by buddy store and transfer zone
- Multiple containers allowed in a single shipment
- Manifest system integration and package tracking ID processing
- Two step approval process to warn of pending shipments
- Restrict merchandise packaged together by merchandise hierarchy

Features

- Search for transfer shipments
- Create a new shipment (with or without container)
- Create a new container, for shipments with container
- View or edit an existing shipment or containers
- Delete or cancel 'In Progress' containers or shipments
- Submit, cancel submit, or dispatch a shipment
- Capture values for CFAs (Custom Flexible Attributes)
- Print pre-shipment and manifest

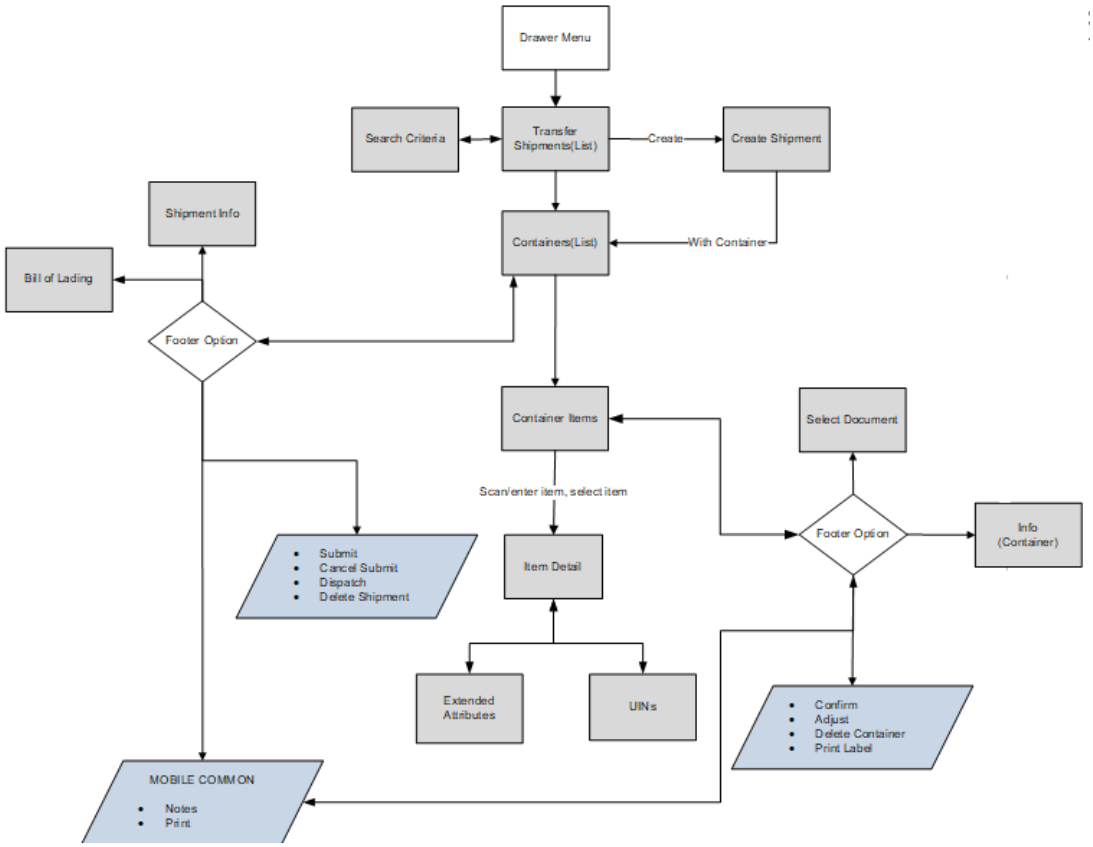
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Figure 7-62 Transfer Shipment without Container Screen Flow



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Figure 7-63 Transfer Shipment with Container Screen Flow



When creating, editing, or viewing a shipment with containers, you are directed to the list of containers within the shipment on the Containers screen. Here, you can create a container, edit or view a container. When creating, editing, or viewing a container, you are directed to the list of items in the container on the Container Items screen. You can add, view, and edit the details of the items on this screen as well as on the Item Detail screen.

When creating, editing, or viewing a shipment without containers, you are directed to the Transfer Shipment Items screen where the items to be shipped and their details can be added.

Submit

The shipment can be saved in 'In Progress' status to continue edits later or it may be submitted or dispatched. Submitting is possible when the store setting Dispatch Validate is configured for 'Ship Submit'. Submitting will set the shipment to a 'Submitted' status and not allow for edits, there are no updates to inventory at this point. The only step possible will be to Cancel Submit or Dispatch. If the system is enabled to obtain Fiscal Doc ID/E-way bill ID for the shipment, the process to request for the same starts once the shipment is submitted.

Dispatch

When the shipment is dispatched, the transfer reserved quantity for the outbound location will decrease in addition to the stock on hand. If no shipping quantities are identified the transaction should be cancelled. Inbound is increased at the receiving store for what has been shipped. If the system is enabled to incorporate Fiscal Doc ID/E-way bill ID as part of the

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shipping process, the shipment cannot be dispatched until the Fiscal Doc ID/E-way bill ID is available. The exception is when the user has 'Allow dispatch without Fiscal Document ID' security permission.

Customer Orders

The Shipment Info screen has a field called Customer Orders, which is set to Yes when there are customer orders associated with transfer documents and a link has been provided to view the details of customer orders associated. It will display the Customer Order and Fulfillment Order IDs, along with the Container ID where the items are in, Status, Total SKUs in the customer order.

When dispatching a transfer shipment, if the transfer associated to the shipment has **Allow Partial** set to **No**, then you must ship the full amount which is requested.

If there is a transfer in the shipment with a customer order with **Allow Partial Delivery** indicator is **Yes** and the system parameter **Customer Order Restriction** is set to **Line Controlled**, the items being delivered must be delivered in their entirety. Partial delivery of an item is not allowed. This validation is done on both Submit and Dispatch of a customer order.

Containers

The containers within a single shipment will display on this screen if the shipment has been created with containers. If the shipment has just been created, the list will be blank. Several functions may be performed on this screen to include the following:

- One or multiple containers can be created, which is controlled by security permission
- Add items from transfer documents and ship them
- Add additional items to the shipment
- View additional details
- Update authorization number, Context Type
- View customer orders associated with transfer documents added to the shipment
- Set up the carrier shipment details
- Submit/Dispatch the shipment

Shipment without Containers

Shipments can also be created without the containers. When a shipment is created, the user is taken to the Transfer Shipment Items screen which will be blank initially. The user can then start adding items directly to the shipment. The user can do the following within the shipment:

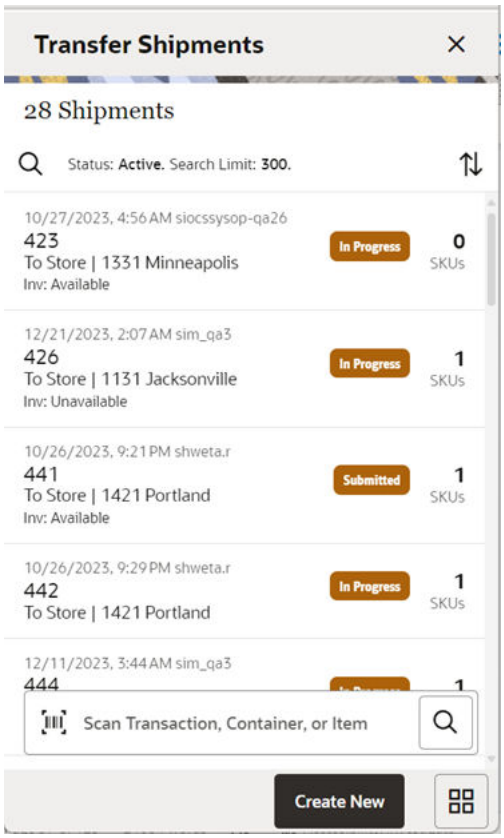
- Add items from transfer documents and ship them
- Add additional items to the shipment
- View additional details
- Update authorization number, Context Type
- View customer orders associated with transfer documents added to the shipment
- Set up the carrier shipment details
- Submit/Dispatch the shipment

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Transfer Shipments

Transfer Shipments are accessed on mobile through the Shipping / Receiving menu within the drawer. Selecting the menu option will take you to the Transfer Shipments screen. On this screen, you can create a new shipment or search for shipment records.

Figure 7-64 Transfer Shipments Screen



When navigating to Transfer Shipping, you go to the Transfer Shipments screen with the default list being defined for 'Active' shipments. This screen gives a quick view of the list of shipments along with the details such as shipment's status, destination type/name, status of the Fiscal Doc/E-way bill request(if the system is configured to use Fiscal Doc ID/E-way Bill ID), etc.

You can use the search criteria magnifying glasses to navigate to the transfer shipment search criteria screen to enter search criteria to search for transfer shipments. User can scan/enter Shipment ID/Container ID(internal/external ID)/Tracking ID/Fiscal Doc ID to fetch the shipment needed. When scanning/ entering these IDs in the scan bar, the system adds the ID scanned to the respective search criteria field and narrows down the current list of shipments by the ID scanned. If there are multiple containers found with the same scanned or entered number, you are prompted to select the shipment/container to return.

Create Shipment

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Figure 7-65 Create Shipment to a store

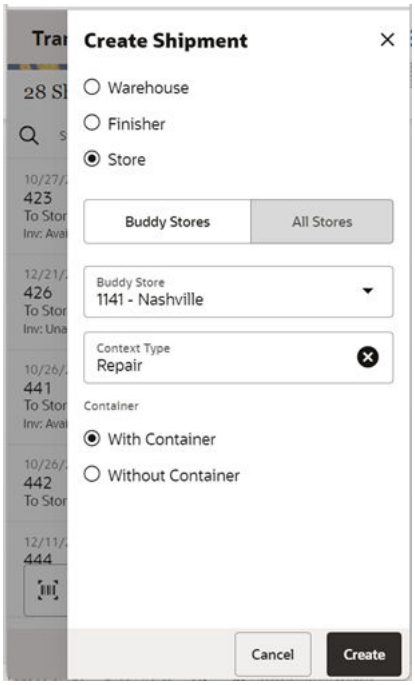
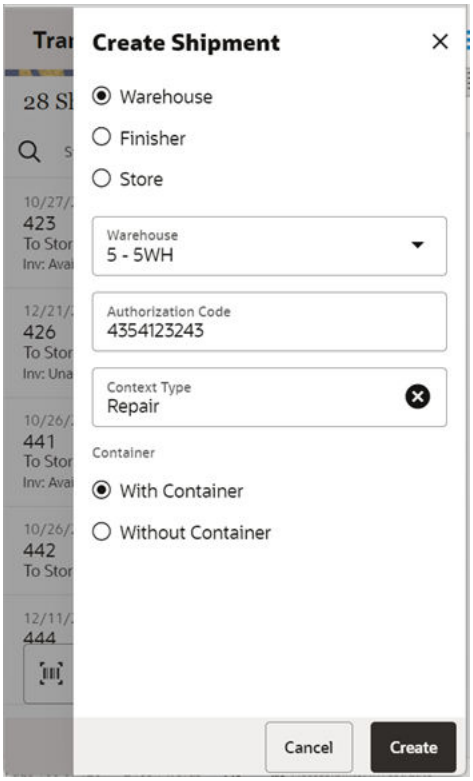
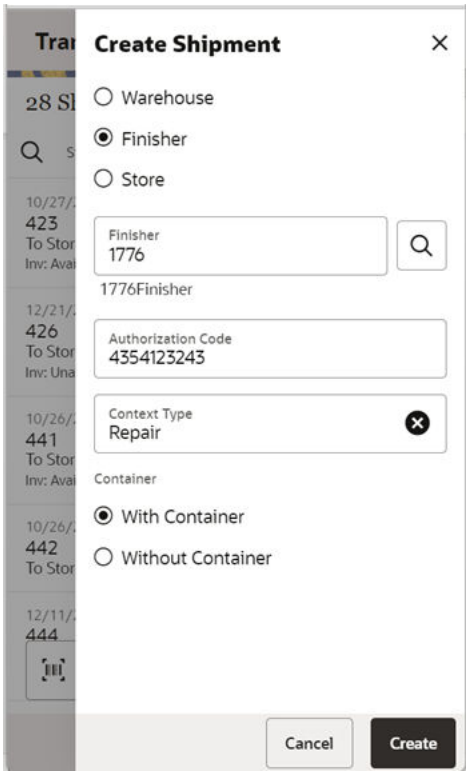


Figure 7-66 Create Shipment to a warehouse



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Figure 7-67 Create Shipment to a finisher



The **Create New** button prompts you to create a new shipment. You can create a shipment for store, warehouse, or finisher. The destination types for which a user can create a shipment is controlled by the data permission **Transfer Destination Type**.

In the case of a shipment to a store, the shipment is allowed to be created only if the destination store is not an excluded store for the source store. That is, the destination store has to be in the shipping network of the source store in order to ship items. However, if the user has **Override Exclude Closed Stores – Store security permission**, the system allows the user to proceed with creating the shipment if needed. The user can setup the shipping network for a store using **Store Shipping Network** screen in the desktop application.

The user can select the destination store either through the Buddy Stores tab or All Stores tab. In the Buddy Stores tab, system will automatically list only the buddy stores set up for the store you are logged into. However, any other store can also be searched and selected from the All Stores tab.

If the destination is a warehouse, the user can choose the warehouse using the drop-down which lists all the warehouses available.

In case of store to warehouse transfers, a shipment can only be created if the destination warehouse is not excluded for return for the Source store. However, if the user has **Override Exclude Shipping Network - Warehouse security permission**, he can proceed with creating the transfer to an excluded warehouse. For a user without this permission, the warehouse dropdown values are limited to the warehouses that are not excluded. A store's warehouse shipping network is setup through webservices.

For users with override permission, a validation is done on **Create** button to confirm if the user wants to proceed with creating a transfer to an excluded store or a warehouse.

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If the destination is a finisher, the user can type in the finisher ID if known or can use the lookup available to search for the finisher.

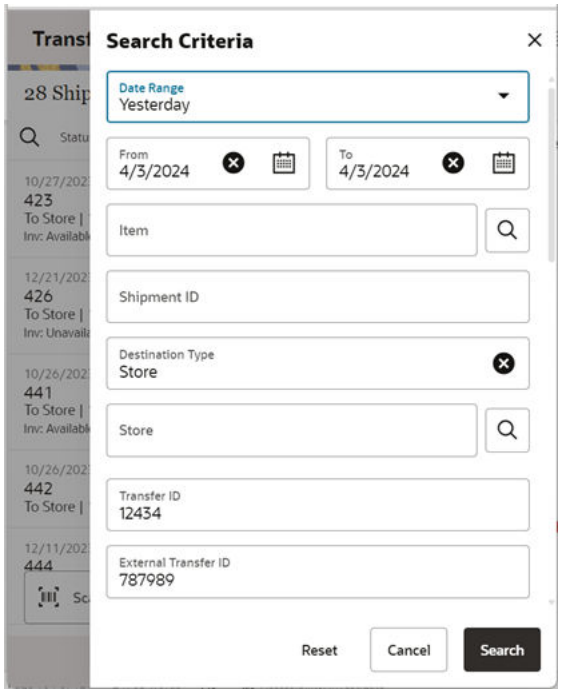
The user can specify the Authorization code for transfers to warehouse and finisher. If the user has permission to enter Context type, it can be entered as well. Context Type can be made mandatory using a Store configuration.

The user can choose to create the shipment with or without containers. Creating a new shipment with containers will direct you to the Containers screen with no containers listed initially. If you select an existing shipment, the same screen displays a list of created containers.

Creating a new shipment without containers or opening a shipment without containers will direct you to the Transfer Shipment Items screen.

Search Criteria (Transfer Shipment)

Figure 7-68 Search Criteria Screen

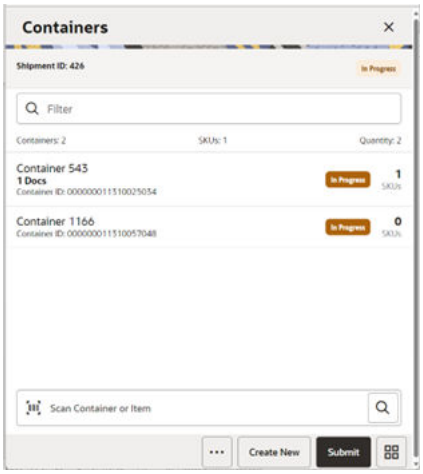


The Search Criteria screen is accessed by the magnifying glasses on the Transfer Shipments screen. After applying the search criteria, the results will be listed on the Transfer Shipments screen and the criteria applied will show. The following fields can be searched on from this screen: Last Updated, Destination Type, Destination ID, Destination, Document ID, ASN, Item, Container ID, Customer Order ID, Fulfillment Order ID, Customer Orders Exist, Shipment Status, Context Type, and Context Value. If the retailer has set up the system to use Fiscal Document/E-way bill for the shipments, there will be additional criteria provided in the screen such as Fiscal Request ID, Fiscal Doc ID and Fiscal Request Status.

Containers Screen

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Figure 7-69 Containers Screen



When creating or selecting an existing shipment with containers from the Transfer Shipments screen, you go to the Containers screen with the list defaulted to Active containers. When scanning/ entering a container ID(internal or SSCC)/Tracking ID/Item ID in the scan bar, the system will navigate you to the **Container Items** screen and display the items currently in the selected container.

The **Create** button will create a new container for the shipment. Creating a new container will direct you to the **Container Items** screen with no details (items) in order to build a new container. Lastly, selecting a container from the list will navigate to the details for that container. The button will not be available after the first container was created if the user doesn't have 'Allow Create Multiple Containers' security permission. This is to restrict users to ship with only one container.

Footer Menu

Shipment Info: Enables the user to access the Shipment Info screen.

Bill of Lading: Enables the user to access the Bill of Lading screen.

Note: The Notes option accesses the notes common dialog to capture notes.

Cancel Submit: Cancel Submit will reverse the Submit and move the shipment back to 'In Progress'.

Delete: Delete will mark the shipment to 'Canceled' status.

Back: Back will exit the shipment. Available in view only mode.

Cancel: This option is used to exit the shipment without saving any changes. This is available only when the shipment is in edit mode.

External Printing: External Printing will display the External Printing popup to select a printer for the pre-shipment notice and manifest documents.

Print: Opens the print dialog and allows you to print various reports and container labels. The Transfer Shipment Container report and the BOL Detail report will be available on this screen.

Footer Buttons

Create: Create will create a new container in the shipment.

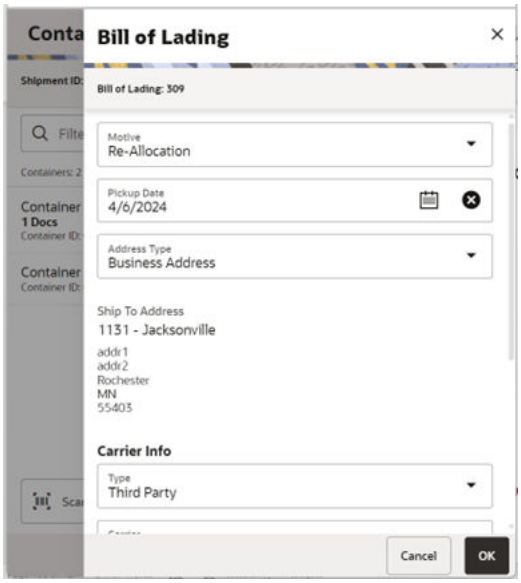
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Submit: Submit will perform validations for 'In Progress' shipments including excluded store validation and lock the shipment for additional edits. The shipment will be ready for dispatch. This menu option will only be available when the store parameter 'Transfer Shipment Dispatch Validate' is set equal to Ship Submit. Validations to check if the destination is a closed store or a closed warehouse for the sending store, mandatory check on CFAs, Context Type etc., will happen here. The process to start obtaining Fiscal Document ID also happens at this point, if configured. **Corporate created transfers must be allowed to be shipped even if the destination is a closed store or a warehouse.**

Dispatch: Dispatch will perform validations including excluded store validation and post transactions to finalize the shipment and no further changes are allowed. Validations to check if the destination is a closed store or a closed warehouse for the sending store, mandatory check on CFAs, Context Type, Fiscal Document ID etc., will happen here. **Corporate created transfers must be allowed to be shipped even if the destination is a closed store or a warehouse.**

Bill of Lading

Figure 7-70 Bill of Lading Screen



The **Bill of Lading** screen is used to enter details for the shipment including transportation details. Editable when the user has Edit Shipment BOL permission.

Details will include: Motive, pickup date, ship to address, carrier type, carrier, carrier service and carrier address.

The **Carrier Type** will be defaulted based on the transfer carrier table; however, you can modify this if necessary. For carrier types of **Third Party**, the Service will need to be selected.

The list of carriers displayed in the Carrier dropdown is controlled by the data permission ‚Shipment Carrier‘. Only the carriers the user has permission to will be listed in the dropdown.

The list of carrier services displayed in the Service dropdown is controlled by the data permission ‚Shipment Carrier Services‘. Only the services the user has permission to will be listed in the dropdown.

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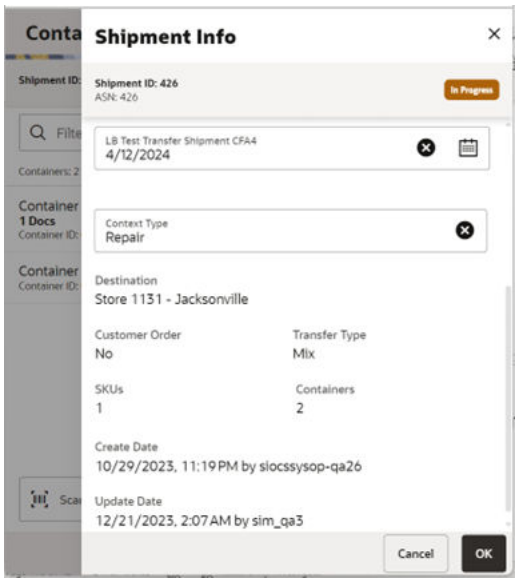
> **Note**
>
> In case the user does not have a permission for a carrier/service, the data will be view only and cannot be changed by the user.

Carriers and services can be overriden by the Manifesting system.

The Carrier information will be locked down once the container has been confirmed. At that time, the Adjust Carrier button will be available to move the containers back to 'In Progress' which will allow you to make changes to the carrier and other shipment details.

Shipment Info

Figure 7-71 Shipment Info Popup



The **Shipment Info** screen contains read-only information about the header level of the shipment as well fields to specify . Details include: Destination Type, Destination, Shipment ID, ASN, Status, Total Container SKUs, Containers, Documents, Customer Order, Total Shipment Qty, Create Date, Create User, Last Update, Last Update User, Submit Date, Submit User, Dispatch Date, Dispatch User. The screen also displays details such as Fiscal Request ID, Fiscal Request Status, Reject Reason, Fiscal Doc ID, Fiscal Doc Link, if the retailer has been using Fiscal Document ID/E-way bill ID in the shipment process.

The screen also enables you to specify information regarding the shipment such as Authorization number, CFAs, Driver and Vehicle details to get Fiscal Doc ID.

If the shipment is to a warehouse or finisher, you can enter an authorization number.

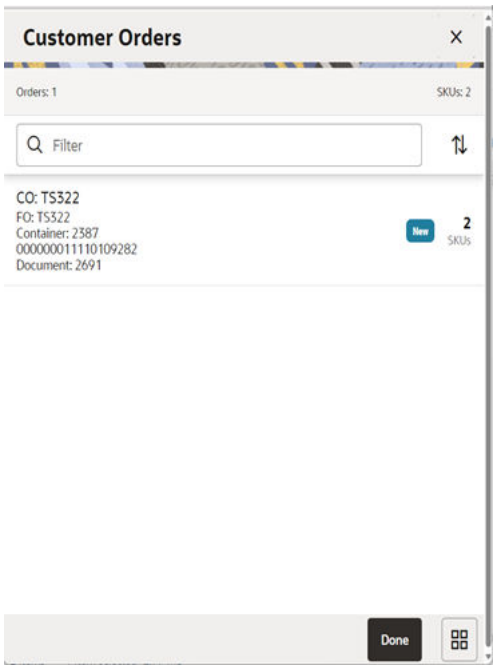
The screen displays the list of CFAs (flexible attributes) that have been set up for Transfer shipments, in the desktop application and lets you enter values for them. The CFAs that are set up as 'Required' must have a value entered for it before completing the shipment. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed and the shipment must be in editable state for entering CFA values.

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The screen also enables the user to specify details such as vehicle number and country, driver name and License number, if the retailer has been using Fiscal Document ID/E-way bill ID in the shipment process.

Customer Orders

Figure 7-72 Customer Orders Screen



The **Customer Orders** screen is an informational screen that contains read-only information about the customer orders within the shipment.

The user will go to the Customer Orders screen in either of two ways: Upon clicking 'View Details' link in the Shipment Info screen and upon clicking 'View Details' link in the Info(Container) screen. The screen will list the customer orders present in the selected shipment if the user opened the screen from Shipment Info screen. The screen will list the customer orders present in the selected container if the user opened the screen from Info(Containers) screen.

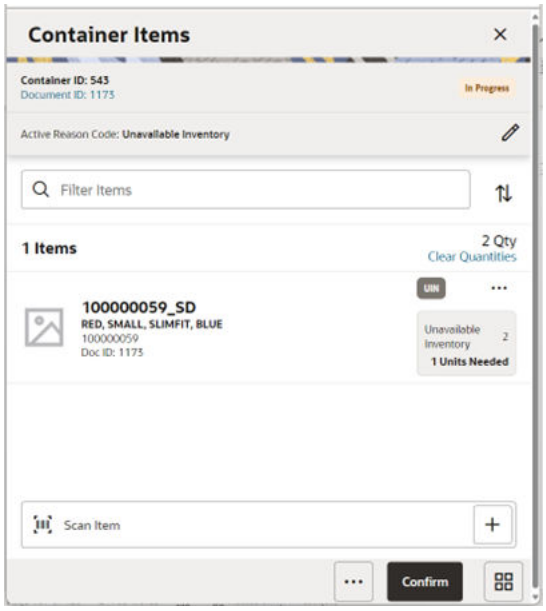
The customer order information displayed in the screen includes: Customer Order/ Fulfillment Order ID, Status, the internal/external Container ID where the items on the customer order has been kept, the Transfer Document ID associated with the Customer Order.

The filter can be used to narrow down the list of items. Filtering can occur by Customer Order ID, Fulfillment Order ID, Container ID, and Customer Order Status.

Container Items

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Figure 7-73 Container Items Screen



The Container Items screen is used when creating a container within a shipment.

There are several functions you can perform on this screen. Some of the features include:

- Create, edit, delete, or confirm a container
- Add items from transfer documents or add loose items
- Adjust(re-open) a container after it has been confirmed

The container can be created with or without referencing a transfer document. The items within a container must be shipped either from available inventory or from unavailable inventory.

When a container is created but not yet completed, the container will display a status of 'In Progress'. The transfer reserved bucket will update the moment the container is saved for on-the-fly shipments. If the item is from a request, reservation must have happened at the time of approval of the request. Any new additions or deletions of items and quantities are updated to the approved document. It will also update the In Shipping quantity in the document. When the shipment is dispatched, the saved quantity in the transfer reserved bucket is removed. This will keep the inventory accurate.

The items on the list are for the container.

The item image for the line items is displayed per configuration. Line items appear in a list and selecting a line item will navigate to the item details of the item. Scrolling in the list of items on the left will display a filter. The filter can be used to narrow down the list of items. Filtering can occur by Item ID, Description, Document ID and Reason Code.

If the **Non-Inventory** indicator of the item is set as **No**, the SOH of the item is updated at the completion of the transaction.

If the **Non-Inventory** indicator of the item is set as **Yes**, the item can be added to the transaction however the SOH will not be updated on confirmation/completion of the transaction. That is, the item can be scanned/added to the transaction, and you will be able to enter/update quantity just like a normal (inventory enabled) item. All the processing rules and validations that apply to inventory enabled items would apply for non-inventoried items too except that the validations done on quantity against SOH will be ignored. On dispatch, the

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SOH of the item will not be updated since the application doesn't preserve the inventory details of the items with **Non-Inventory** indicator set as **Yes**. Publishing of non-inventory items can be restricted depending on administration integration settings.

Inventory Type of items (Available or Unavailable) in the container is held at a container header level. This means that all items in the container must be for the same inventory type, there cannot be a mixture. Once items from a transfer have been added to the container, the inventory type is set for the container and can no longer be changed. However, a shipment may have both unavailable and available containers.

If inventory is from unavailable inventory, the shipped quantity cannot exceed the unavailable stock. If the system is configured to use sub-buckets, then the sub-bucket associated to the reason codes which are for unavailable inventory will be displayed. The sub-bucket will be updated as the unavailable inventory is updated.

When a container is set up to use unavailable inventory, a reason code must first be selected before you can add or edit an item in the container. The reason code is selected on the header part of the screen. Containers that are set up to use available inventory will not use reason codes. The reason code selected will be applied to all newly added items until it is changed to a different reason, in which the newly changed reason will be added to the subsequent newly added items.

For containers with available inventory type, scanning or entering an item in the scan bar will navigate you to the Item Detail screen for the item or remain in the same screen(depending on the User preference set). Quantity may be updated, depending on the scan mode. If the user scans the Item ID of a UIN item or if he scans a UIN, he will be taken to the UIN tab of the Item Detail screen. You can also edit/update the ship quantity from this screen.

For containers with unavailable inventory type, scanning or entering an item in the scan bar will always navigate you to the Item Detail screen for the item irrespective of the User preference set. The quantity can be updated from the Item detail screen unlike containers with available inventory type.

In the header of the screen, the currently selected transfer document will display. When first entering the container, 'Adhoc Document' will be displayed. You will need special permissions to add items without selecting a document. Access the active documents by tapping on this link which to take you to the Select Document screen.

Next to each item, the UIN icon will display if the UINs have been associated to the item.

The ellipsis in the lower right hand corner will access the footer menu which will contain all the functions that can be performed on a container.

Save: Saves the container in 'In Progress' status to be completed later. This option is only available when the screen is in edit mode.

Print: Opens the print dialog and allows you to select formats and print various reports and container labels. The Transfer Shipment Container report will be available on this screen.

Print Tickets: Opens the Print Tickets dialog to print the tickets or labels for the current container items. This is described in common usage chapter with more details.

Delete: Marks the container to 'Canceled' status. This option will only be available for containers that are in a New or In Progress status.

Cancel: Exits the container and changes made in that session will not be saved. This screen is only available when the screen is in edit mode.

Back: Returns to the previous screen. This option is only available when the container is view only.

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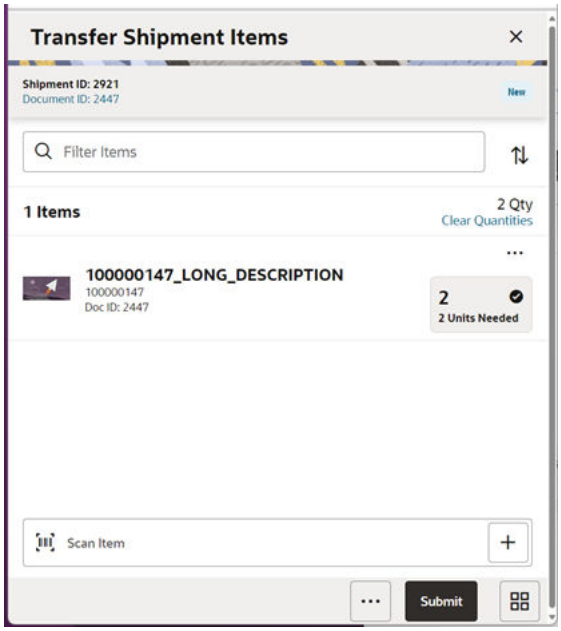
Footer Buttons

Adjust: Reopens a container in Completed status and moves it back to In Progress.

Confirm: Moves the container in an In Progress status to Completed.

Transfer Shipment Items (without Container)

Figure 7-74 Transfer Shipment Items Screen



The Transfer Shipment Items screen is used to add items within a shipment without a container.

There are several functions you can perform on this screen. Some of these include:

- Add items from transfer documents or add loose items
- Submit/Dispatch the shipment

The shipment can be created with or without referencing a transfer document. The items within a container must be shipped either from available inventory or from unavailable inventory.

When a shipment is created but not yet completed, the shipment will display a status of 'In Progress'. The transfer reserved bucket will update the moment the shipment is saved for on-the-fly shipments. If the item is from a request, reservation must have happened at the time of approval of the request. Any new additions or deletions of items and quantities are updated to the approved document. It also updates the In Shipping quantity in the document. When the shipment is dispatched, the saved quantity in the transfer reserved bucket is removed. This will keep the inventory accurate.

The item image for the line items is displayed per configuration. Line items appear in a list, and selecting a line item will navigate to the item details of the item. Scrolling in the list of items on the left will display a filter. The filter can be used to narrow down the list of items. Filtering can occur by Item ID, Description, Document ID and Reason Code.

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If the **Non-Inventory** indicator of the item is set as **No**, the SOH of the item is updated at the completion of the transaction.

If the **Non-Inventory** indicator of the item is set as **Yes**, the item can be added to the transaction however the SOH will not be updated on confirmation/completion of the transaction. That is, the item can be scanned/added to the transaction, and you will be able to enter/update quantity just like a normal (inventory enabled) item. All the processing rules and validations that apply to inventory enabled items would apply for non-inventoried items too except that the validations done on quantity against SOH will be ignored. On dispatch, the SOH of the item will not be updated since the application doesn't preserve the inventory details of the items with **Non-Inventory** indicator set as **Yes**. Publishing of non-inventory items can be restricted depending on administration integration settings.

Inventory Type of items (Available or Unavailable) in the shipment is held at a header level. This means that all items must be for the same inventory type, there cannot be a mixture. Once items from a transfer have been added to the shipment, the inventory type is set and can no longer be changed.

If inventory is from unavailable inventory, the shipped quantity cannot exceed the unavailable stock. If the system is configured to use sub-buckets, then the sub-bucket associated to the reason codes which are for unavailable inventory will be displayed. The sub-bucket will be updated as the unavailable inventory is updated.

When a shipment is set up to use unavailable inventory, a reason code must first be selected before you can add or edit an item in the shipment. The reason code is selected on the header part of the screen. Shipments that are setup to use available inventory will not use reason codes. The reason code selected will be applied to all newly added items until it is changed to a different reason, in which the newly changed reason will be added to the subsequent newly added items.

For shipments with available inventory type, scanning or entering an item in the scan bar will navigate you to the Item Detail screen for the item or remain in the same screen (depending on the User preference set). Quantity may be updated, depending on the scan mode. If the user scans the Item ID of a UIN item or if he scans a UIN, they will be taken to the UIN tab of the Item Detail screen. You can also edit/update the ship quantity from this screen.

For shipments with unavailable inventory type, scanning or entering an item in the scan bar will always navigate you to the Item Detail screen for the item irrespective of the User preference set. The quantity can be updated from the Item detail screen, unlike containers with available inventory type.

In the header of the screen, the currently selected transfer document will display. When first entering the shipment, ‘Adhoc Document' will be displayed. You will need special permissions to add items without selecting a document. Access the active documents by tapping on this link which to take you to the Select Document screen.

Next to each item, the UIN icon will display if the UINs have been associated to the item.

The ellipsis in the lower right hand corner will access the footer menu, which will contain all the functions that can be performed on a container.

Footer Menu

Info: Accesses the Info screen.

Shipment Info: Accesses the Shipment Info screen.

Notes: Accesses the notes common dialog to capture notes.

Save and Exit: Saves the shipment in ‘In Progress’ status to be completed later and exit the screen. This option is only available when the screen is in edit mode.

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Bill of Lading: This menu option will allow the user to view/enter the shipment information for the carrier and other details.

Cancel Submit: This menu option will move the shipment back to a state that allows edits.

External Printing: This menu option will allow the user to set the printer to use for the user session when automatically generating specific manifesting documents.

Print: Opens the print dialog and allows you to select formats and print various reports and container labels. The Transfer Shipment and BOL report will be available on this screen.

Delete: Marks the shipment to 'Canceled' status. This option will only be available for shipments that are in a New or In Progress status.

Cancel: Exits the shipment and changes made in that session will not be saved. This screen is only available when the screen is in edit mode.

Back: Returns to the previous screen. This option is only available when the shipment is view only.

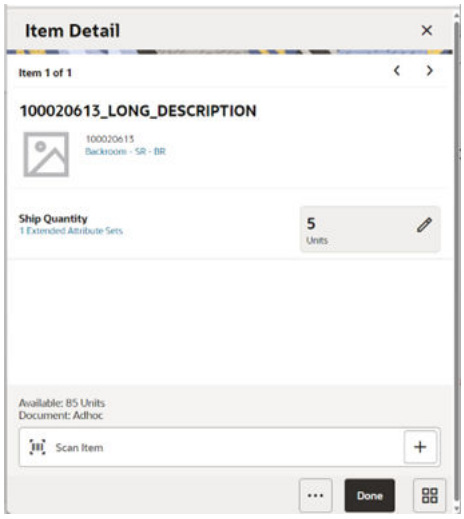
Footer Buttons

Submit: Submit will perform validations for 'In Progress' shipments including excluded store validation and lock the shipment for additional edits. The shipment will be ready for dispatch. This menu option will only be available when the store parameter 'Transfer Shipment Dispatch Validate' is set equal to Ship Submit. Validations to check if the destination is a closed store for the sending store, mandatory check on CFAs, Context Type etc., will happen here. The process to start obtaining Fiscal Document ID also happens at this point, if configured.

Dispatch: Dispatch will perform validations including excluded store validation and post transactions to finalize the shipment and no further changes are allowed. Validations to check if the destination is a closed store for the sending store, mandatory check on CFAs, Context Type, Fiscal Document ID etc., will happen here.

Item Detail

Figure 7-75 Item Detail (Quantity) Screen



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Figure 7-76 Item Detail (UIN) Screen

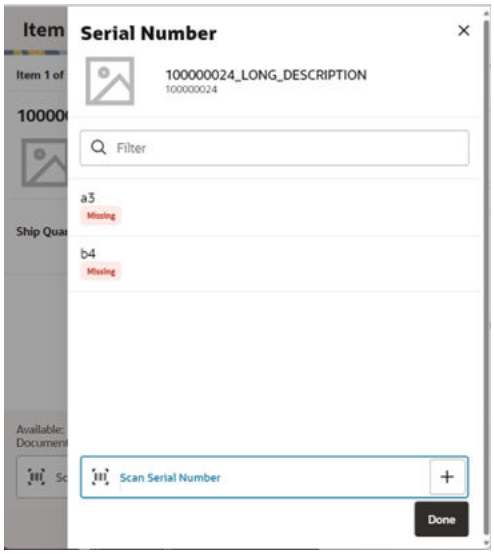


Figure 7-77 Item Detail (Extended Attributes) Screen



The Item Detail screen is the screen used when selecting or scanning an item from the Container Items screen or from the Transfer Shipment Items screen when not using a container. This screen allows the user to add ship quantity for an item. Scanning or entering an item on this screen in the scan bar will update the ship quantity per the scan mode and refresh the item detail screen for the item and quantity scanned. The quantity can be edited and updated manually if permissions allow.

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Items with **Non-Inventory** Indicator set as **Yes** are also allowed to be in the transaction and you can enter ship quantity for these items.

If the user scans the Item ID of a UIN item or if he scans a UIN, he will be taken to the UIN tab of the Item Detail screen.

The item information including the image which is system configured to display in the header. The screen contains information fields of inventory qty, remaining qty, document qty and reason code (for unavailable inventory only) pertaining to the bucket stock is coming from. Lastly, the details of the last scanned barcode will be displayed at the top.

For containers with inventory type of 'Unavailable,' if the same item must be shipped using multiple reason codes/sub-buckets, you can do this from the same Item Detail screen.

Pack size can be edited from this screen.

The footer menu (ellipsis button), contains a options to Edit pack size, View Locations and Delete. Page through existing item in the container view the arrows on the top.

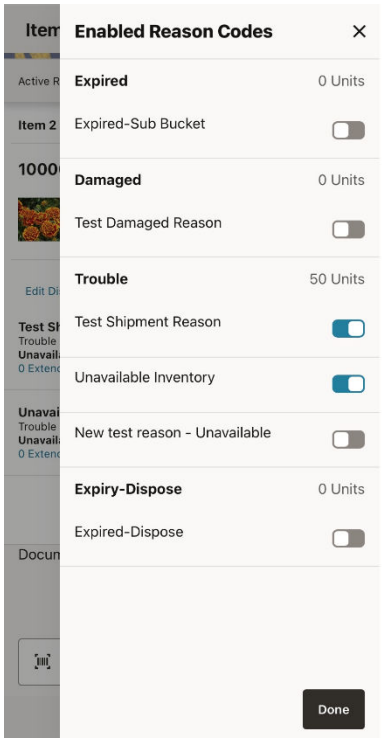
There is also a UIN tab to take you to the UIN screen to add and remove UINs for UIN items.

In order to add UIN details for UIN items, the UIN screen is accessed by selecting the ship quantity field for the item from the Item Detail screen.

There is also an Extended Attributes link that enables the user to view/capture Extended Attributes for the item, if the item is not configured to capture extended attributes.

Reason Codes

Figure 7-78 Enabled Reason Codes

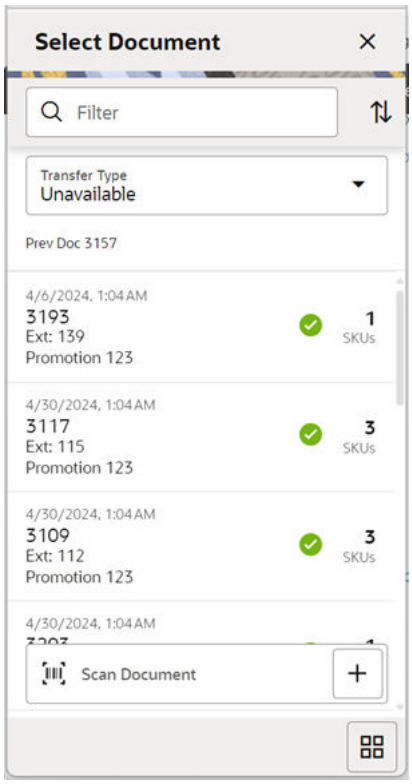


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The Reason Codes screen appears when a user clicks the Edit Displayed Reason Codes from the Item Detail screen. It shows the reason codes that are on the shipment and allows a user to add and remove reason codes.

Select Document

Figure 7-79 Select Document Screen



The Select Document screen is used for adding items to ship into the container or shipment without containers. Access this screen by tapping the Document ID in the header bar of the Container Items screen for shipments with containers or from the Transfer Shipment Items screen for shipments without containers. If there are no approved documents to display, the list will be empty.

The documents displayed in the screen are based on the Transfer Type (Available or Unavailable) selected in this screen (header) or in the Info screen. The default will be to display documents with inventory type set to available.

Additionally, if you have placed a hierarchy restriction using the Limit Item To drop-downs on the Info screen, only those documents with items matching the criteria will display. This happens once the restriction is set by adding the first item. If no items have been added yet, all documents will be displayed for the appropriate transfer type.

Scanning or entering a document ID on this screen in the scan bar will display the Document Options popup if any are found. The filter can be used to narrow down the list of documents. Filtering can occur by Document ID, External ID, Customer Order ID, Fulfillment Order ID, Context type, and Context value.

The documents are grouped by documents with remaining quantity and documents with no remaining quantity. The documents are sorted by Not After Date and then Doc ID based on the

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group they fall into (remaining vs no remaining). If the Not After Date is blank, the document displays on the bottom of each of the groups they belong to.

The following icons will be displayed to indicate the status:

- Green circle with check indicates the document has remaining quantities.
- Orange triangle with exclamation point indicates the document has no remaining quantities.

Options to Add to Container

You can select an approved transfer document and have different options to apply the items. In the Container Items screen or Transfer Shipment Items screen, any items added manually, will be added to the adhoc transfer document. If you do not want to add the items from a transfer, select **Adhoc Document** from this screen to clear out the document selection. Items added manually will be added to the Ad Hoc transfer if adhoc document is selected. Adding loose items to a container is only allowed for Containers setup for Available inventory.

- Apply Item(s): The items are pre-filled in the container/shipment without quantities.
- Apply Item(s) & Quantity: The items with their remaining quantity are added into the container/shipment.
- Use Document: Manually add the items to the container/shipment validating against the selected document. You are prompted when an item does not exist on the document. If not, you may or may not have the ability to add to the container or to the selected document.

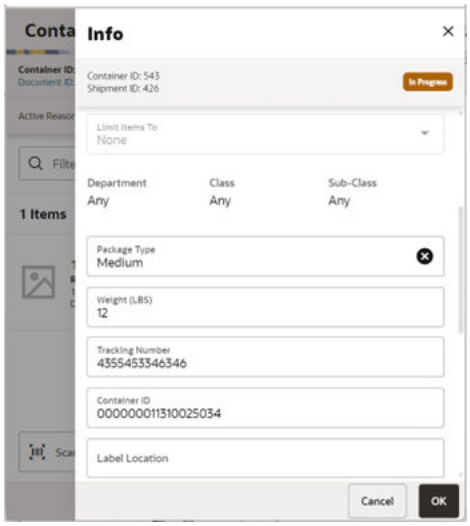
Once the document and items are selected, the document ID is populated in the header of the Container Items screen or Transfer Shipment Items screen as well as next to each item added to the container/shipment. There are various permissions that will control which options you can perform.

The **Adhoc Document** button is used to clear the selected document. You need special permissions to use this button. Any items added when Adhoc Document is selected, will be added to an ad hoc transfer created for the entire shipment for any unexpected items not associated with an existing transfer. The button will not be available when the container has been set up to pull items from unavailable inventory buckets since a pre-created transfer document is required.

Info (Container)

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Figure 7-80 Info Screen



The Info screen is used to enter details for the container including transportation details. You navigate to this screen from the footer menu on the Container items screen or from the Transfer Shipment Items screen. Details will include: ID, Transfer Type, Container ID, Package Type, Weight, Tracking ID, and Container Restriction by Hierarchy.

The inventory status and the container restriction by hierarchy will be locked down once the first item has been added to the container.

Limit Items to (Hierarchy Restriction)

If you want to set up the container/shipment(without container) to hold the same type of items, you can restrict by department, class, and subclass. You do not select the actual department, but set the hierarchy level to restrict by. When the first item is added to the container/ shipment(without container), the department, class, and/or subclass is set for the container/ shipment(without container) based on the hierarchy the item is part of.

Any items added subsequently must match the hierarchy of the first item. For example, if the restriction was set up to limit items to the same department and the first item added was for the Women's Department, only items that match the Women's Department can be added to the container, but it will not matter which class and subclass the item is in since the hierarchy level is set at Department.

The hierarchy level is auto defaulted depending on the permission you have been given.

If manifesting has been configured, the package type and weight may be required by the carrier selected for the shipment before you can confirm the container/dispatching the shipment(without container).

The screen also displays the list of CFAs (flexible attributes) that have been set up for Transfer shipment containers in the desktop application, and lets you enter values for them. The CFAs that are set up as 'Required' must have a value entered before confirming the container. The value can be one of the following: Date, Text, Decimal, Long, depending on the 'data type' set up for the CFAs while creating them in the desktop application. Appropriate security permission is needed, and the container/shipment must be in editable state for entering CFA values.

The user can enter Label Location, which holds the location of manifesting document to print it for later use.

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The Info screen also displays read-only information such as ID, Container ID, Shipment ID, Status, Destination Type and Destination, list of transfer documents that have been added, Create Date, Create User, Update, Update User, Approve Date, Approve User.

For transfer shipments without container, the ID, Status, Container ID, Create Date, Create User, Update, Update User, Approve Date, Approve User fields are not displayed.

Transfer Receiving (JET Mobile)

The Receiving dialog allows users to receive store, warehouse and external finisher deliveries. The mobile application enables the retailer to receive deliveries with containers and without containers. The deliveries can be for both available and unavailable inventory. The mobile application also supports misdirected containers or unexpected containers originally not listed on the delivery.

Transfer Receiving Features

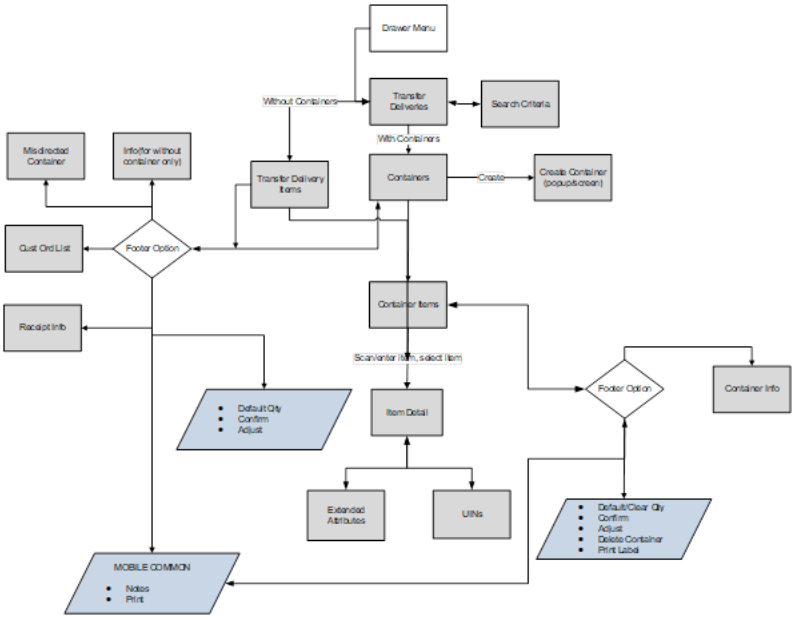
- Receive by Advance Shipment Notice (ASN), container, item level, or automatically.
- Record damages during receiving
- Blind receiving
- Allows copying the expected quantity to received quantity for all items
- Restrict Over receiving
- Provides the option of whether the delivery has to be received in the shop floor or back room
- Prevents accidental receiving of containers without receiving any items
- View details of the customer orders associated with the delivery
- Manage container deliveries for another destination or creating an additional container
- Multiple methods to scan and identify the container delivery (GS1, Container ID, Tracking ID)
- Inventory updated immediately as containers are scanned and confirmed

Mobile Features

- Search for transfer receipts
- Create a new container
- View or edit existing receipts or containers
- Capture values for CFAs (Custom Flexible Attributes) for the delivery and containers
- Delete or cancel 'In Progress' containers or receipts
- Confirm, mark damage, mark missing, or receive a container

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Figure 7-81 Transfer Receiving Mobile Screen Flow



Transfer Receiving is accessed on mobile through the Shipping / Receiving menu within the drawer menu. It can also be accessed from Quick Actions screen or from an open transaction. Selecting the option will take you to the Transfer Deliveries screen. On this screen, you can search for delivery/receipt records which will be presented on the screen. You can edit or view a delivery/receipt.

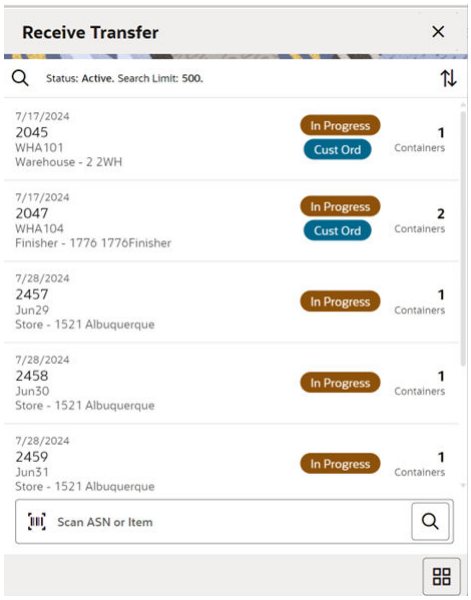
For a delivery with containers, when editing or viewing a delivery/receipt you will first be directed to the list of containers within the delivery/receipt on the Containers screen. You can create a container, edit or view a container and capture values for CFAs. When creating, editing, or viewing a container, you are directed to the list of items in the container on the Container Items screen. You can add, view and edit the details of the items on the Item Detail screen. The Item Detail screen has tab for UINs if the system and/or item is configured. You can also capture values for CFAs that are setup for the containers

For a delivery without containers, when editing or viewing a delivery/receipt, you will be directed to the list of items within the delivery/receipt on the Transfer Delivery Items screen.

Transfer Deliveries

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Figure 7-82 Receive Transfer Screen



When navigating to Transfer Receiving, you go to the Receive Transfer screen with the default list defined for 'Active' receipts in 'New' or 'In Progress' status.

The deliveries are populated by the system from an internal or external source (Warehouse or a Finisher). The ASN corresponds to the Shipment ASN for a store to store transfer.

Use the search criteria magnifying glasses to navigate to the transfer receipt search criteria screen and enter search criteria for transfer receipts.

You can also use the scan bar in the Transfer Deliveries screen to lookup a delivery.

Selecting a receipt will direct you to the Containers screen and will display a list of containers if the receipt has containers. If the receipt does not have containers, you will be directed to Transfer Delivery Items screen.

An estimated expected date will be populated if one exists in the ASN. When the delivery has been received, the receive date field will be updated. You can identify any container marked as missing or holding customer orders.

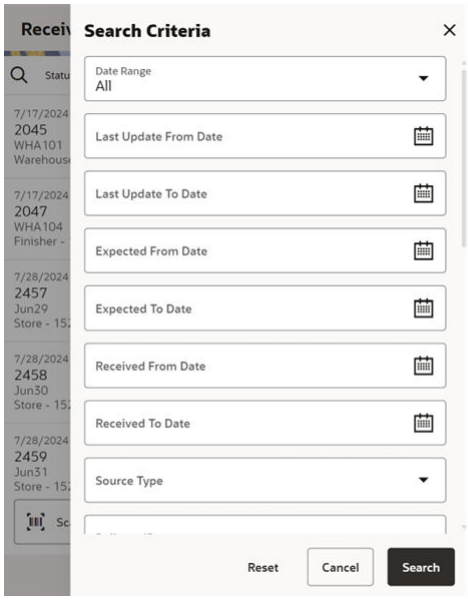
This screen allows you to identify if the transfer being received is for a customer order.

If an unexpected container arrives, search for the container using the misdirected container screen. Receiving notes may also be captured at the receipt and container level.

Search Criteria (Transfer Receiving)

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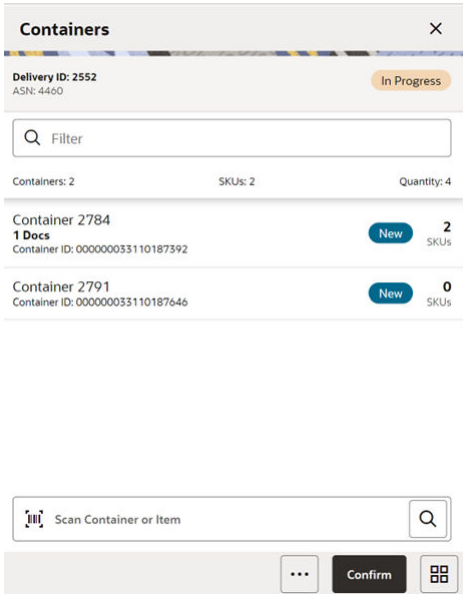
Figure 7-83 Search Criteria (Transfer Receiving) Screen



The Search Criteria screen is accessed using the magnifying glass icon on the Transfer Deliveries screen. After applying the search criteria, the results will be listed on the Transfer Deliveries screen and the criteria applied will show. The fields available to search by include: expected date, received date, source type, source ID, source, delivery ID, asn, item, status, container ID, document ID, customer order ID, fulfillment order ID, customer orders exist, context type, and context value. Transfer Deliveries can also be searched based on Fiscal Doc ID/E-way Bill ID.

Containers

Figure 7-84 Containers Screen



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When selecting a receipt from the Receive Transfer screen, you go to the Containers screen, with a list will showing 'Active' containers on top. When scanning/entering a container ID in the scan bar, the system navigates you to the Container Items screen and displays the items currently in the selected container.

You can scan or enter the internal or external container IDs to find the matching containers in the receipt. A filter can be used to narrow down the list of containers. Filtering can occur by internal ID, container ID, and container status.

Containers can be received individually by selecting the container. Click **Default Qty** and all items received quantity for each container is set to the expected quantity. Containers can only be received at a container level if they have not been received at the item level.

If the delivery has already been received and if the receipt date is within the system configured number of days allowed to adjust a receipt, it is possible to reopen the specific container on a receipt by clicking the container. Adjust the container from within the container dialog. The receipt can be saved as 'In Progress' to complete receiving at a later time. Saving the receipt will not make any updates to the stock on hand.

Confirming the receipt will mark all containers with received quantities to Received. Stock on hand is updated when the status of the container changes to Received, either from within the receipt details or from within the Container. Any containers with no received quantities will be marked as Missing.

Several validation checks are performed:

- When none of the containers have been received, that is, all the items in all the containers have null received quantity:
  - If the user has security permission 'Confirm Empty Receipt', they will be prompted to ensure they would like to default 0-quantities.
  - If the user does not have security permission 'Confirm Empty receipt', they will not be able to confirm the delivery.
- If some containers have been received and there are some containers in New or In Progress status holding items without a received quantity, the system checks whether the user has permission to 'Allow Default Zero at Confirmation'.
  - If the user has permission, the system will prompt them to indicate whether to set the quantities to zero.
  - If the user does not have permission, they will not be able to confirm the delivery. At this point, the user must either save it for someone else with proper permission to confirm, or receive the items that are blank.
- The system checks whether there are any containers that are over received and if found, the system checks whether the user has permission to over receive based on the Allow Over Receiving store to Store ASN permission (similar permissions are added for warehouse and finisher).

Footer Menu

Delivery Info: Info will access the Info (Receipt) screen.

Notes: The Notes option accesses the notes common dialog to capture notes.

Create: Creates a new container in the receipt.

Default Qty: Copies the expected quantity to the received quantity field for all containers on the delivery/receipt.

Misdirected Container: Accesses the Misdirected Container screen.

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Back: Exits the receipt.

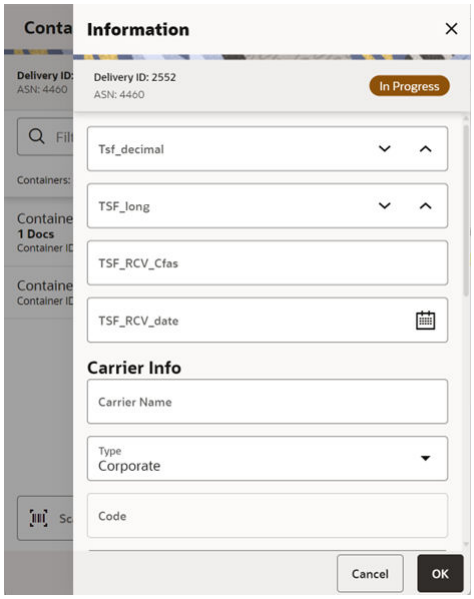
Print: Opens the print dialog and allows you to select formats and print various reports and container labels. The Transfer Receipt report is available on this screen.

Footer Button

Confirm: Sets the receipt to a 'Received' status.

Delivery Info

Figure 7-85 Delivery Info Screen

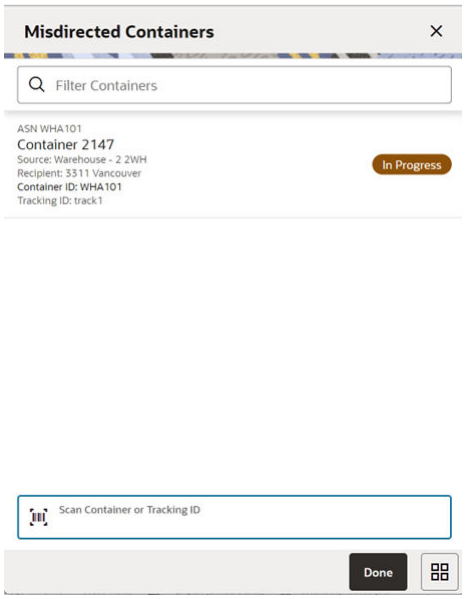


The Delivery Info screen is used to enter details for the delivery including transportation details. Details include: CFAs, Carrier Name, Carrier Type, Carrier Code, License Plate, Freight ID, Bill of Lading, and Delivery From Address. The screen also contains read-only information about the header level of the receipt. Details include: Source Type, Source, ID, ASN, Status, Expected Date, Create Date, Create User, Updated, Update User, Received, Received User, Fiscal Doc ID, QC Indicator, Customer Orders if present.

Misdirected Containers

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Figure 7-86 Misdirected Containers Screen

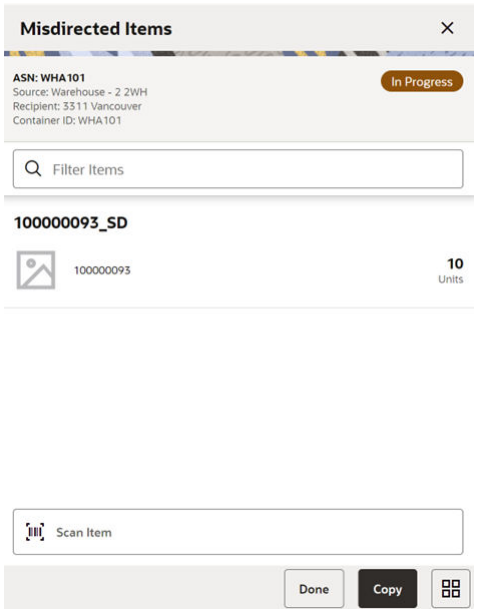


When selecting Misdirected Container from the Containers screen, you go to the Misdirected Container screen with the screen showing an empty list. When scanning/entering a container ID in the scan bar, the system will display matching containers available in the entire enterprise. Scan or enter the internal or external container IDs or Tracking ID to find the matching containers in the receipt.

When selecting a container within the list, you are taken to the Misdirected Items screen.

Misdirected Items

Figure 7-87 Misdirected Items Screen



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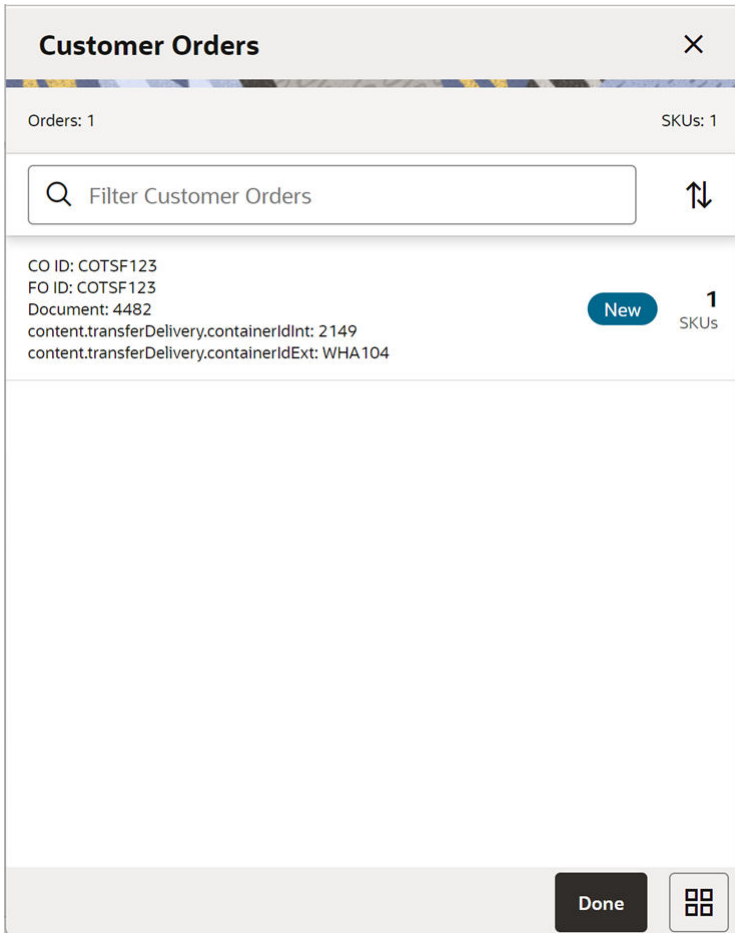
The Misdirected Items screen is used when selecting a container from the Misdirected Container screen. Details about the intended destination are displayed at the top of the screen. The details include: ID, Container Status, Source Type, Source, Destination Type, Destination, and Container ID. When scanning/entering an item in the scan bar, the system will update the filter bar and display the resulting item.

The filter can be used to narrow down the list of items. Filtering can occur by item ID and description.

The **Copy** button will copy all items from the container to a new container. A notification is sent to the original destination store to inform them the container intended for their location has been received in another location. The old container ID will be written into the reference container field for the newly created container and the old container will be moved to a 'Missing' status.

Customer Orders

Figure 7-88 Customer Orders Screen



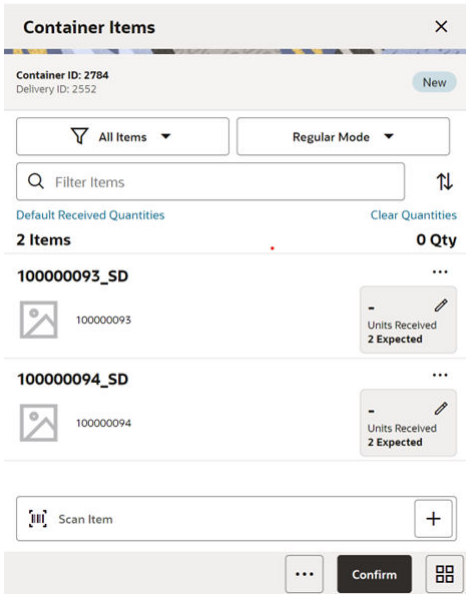
The screen is an informational screen that contains read-only information about the customer orders within the receipt. Details include: Customer Order/Fulfillment Order, Status, Internal and External container ID. It can be accessed from clicking ‘View Details’ link from the Delivery Info screen or from the Info screen.

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Scrolling in the list of customer order/fulfillment orders on the left will display a filter. The filter can be used to narrow down the list of items. Filtering can occur by Customer Order ID, Fulfillment Order ID, Container ID, and Customer Order Status.

Container Items

Figure 7-89 Container Items Screen



The Container Items screen is used when selecting a container to receive from the Containers screen

This screen is used to work with the contents and details within the container. Information is populated from an Advanced Shipment Notice (ASN) and you mark the items as Received or Damaged. The items on the list are for the container. The item image for the line items is displayed per configuration.

If the **Non-Inventory** indicator of the item is **No**, the SOH of the item is updated at the completion of the transaction.

If the **Non-Inventory** indicator of the item is **Yes**, the item can be added to the transaction; however, the SOH will not be updated on confirmation of the receipt. Item can be scanned/ added to the transaction, you can enter/update quantity just like a normal (inventory enabled) item. All the processing rules and validations that apply to inventory enabled items would apply for non-inventoried items too except that the validations done on quantity against SOH will be ignored. On confirmation of the receipt, the SOH of the item will not be updated since the application doesn't preserve the inventory details of the items with **Non-Inventory** set as **Yes**.

When the screen is set to regular receiving mode, the header bar will display the number of SKUs, 'Receiving' and total expected quantity. Scanning/entering an item will update the received quantity. When the screen is set to damage receiving mode, the header bar will display the number of SKUs, 'Damages', and total expected quantity. Scanning/ entering an item will update the damaged quantity. Finally, when the screen is set to display only discrepancies, the number of discrepancies is displayed on the left.

Line items appear in a list and selecting a line item will navigate to the item details of the item. If an item has been changed in the current session, it will be indicated by a bar on the left of

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the item. The filter can be used to narrow down the list of items. Filtering can occur by Item ID, Description, Expected Qty, Received Qty, and Damaged Qty..

Scanning or entering an item in the scan bar will navigate you to the Item Detail screen for the item. If the user scans the Item ID of a UIN item or scans a UIN, they will be taken to the UIN tab of the Item Detail screen.

Quantity may be updated, depending on the scan mode.

The following icons will be displayed next to the item: green circle with check indicates the item is not discrepant and the blue circle with an 'i' indicates the item is discrepant. An item is discrepant when the received quantity plus the damaged quantity does not equal the expected quantity. If configured, unexpected items may be added to the container. A new transfer will be created for the unexpected items. There will only be one transfer created for the entire receipt.

The entire container may be marked as Damaged. in that case, a reason for the damage is displayed on the Container Info screen. The container can be marked to be received on the shopfloor directly.

Receive Transfer Delivery

When the delivery is being received, the status of the delivery/receipt will move to 'In Progress' status at the receiving store. Press the **Cancel** button and the delivery/ receipt will remain as 'New'. If configured for blind receiving, the expected inbound quantities will not display.

You may select Receiving Mode as Regular to receive items in good condition or change the Receiving mode to Damages and mark items as damaged if necessary.

When confirming a delivery, the status is updated to ’Received’ and inventory is updated. The merchandising system is also notified at the container level for the receipt. This provides an up to date view.

This screen also provides an option to the user to view all items or only damaged/ discrepant/Not received/received items.

You can also default received/damaged quantity with remaining quantity using Default Received Quantities/Default Damaged Quantities, respectively. You can manually enter the received quantity using the Edit Quantity popup.

When damaged items are received, the inventory for those items will be put into a Non-sellable Unavailable bucket. The total received is the sum of the received and the damaged quantities.

Receive Entire Delivery

If the system parameter **Receive Entire Transfer** is set equal to **Yes**, you cannot add or remove items from a delivery.

Managing Discrepancies

Deliveries can be received for over, short or the exact quantity dispatched. Discrepancies are easily managed with the **Display Only Discrepancies** footer menu option. When selected, the expected quantity will be compared with the received plus damaged quantity, and only the items with a discrepancy will display. Unexpected items added during the session will not show up on the discrepancy list since there is no expected quantity.

Store to Store transfer receipt overages will adjust the difference out of the sending store's stock on hand. There is not an inventory adjustment created for this overage, but an e-mail notification will be generated and sent to the sending store.

Adjust Container

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After the delivery has been received, it is possible for a user to adjust each container on the receipt. This will depend on the **Number of Days** received transfers can be adjusted system parameter. Select the **Adjust** button, and the container moves back to 'In Progress'. The entire container is reversed out and you will need to reconfirm. The full reversal will display in Transaction History.

Adjusting can only be done at the container level. The entire receipt cannot be adjusted at once. Once the original receipt has been confirmed, the inbound bucket will no longer see a change. In some cases, the container may be restricted from adjustments, such as when customer order reservations exist. If the container has been adjusted, a check box will be marked in the Container Info screen. The received quantity and damaged quantity fields will be populated with the same value as when the container was confirmed.

Footer Menu

Info: Info will access the Info (Container) popup.

Notes: The Notes option accesses the notes common dialog to capture notes.

Save: Saves the container in 'In Progress' status to be completed later. This option is only available when the screen is in edit mode.

When the container is saved, the UINs flagged as Received or Damaged and are not flagged to remove, the UIN status is updated to 'In Receiving'.

- If a UIN is flagged for removal, the UIN will be deleted if the UIN has a status of 'Unconfirmed' (this identifies the UIN as manually added).
- If a UIN is flagged for removal, the UIN receiving mode is removed if the UIN has any status other than 'Unconfirmed' (this identifies the UIN as pre-existing from an ASN).
- If an item is flagged for removal, when you save the container and returns, the item will no longer exist in the container. Note: Only unexpected items added can be removed.
- If a UIN was relocated from another store:
  - The UIN status is updated from ‘In Stock’ to ‘In Receiving’.
  - A notification is generated and sent to the store from which the UIN was relocated.

Delete: Marks the container to 'Canceled' or 'Missing' status. If the container is from an external system, the container will be marked as 'Missing', otherwise, it will be marked as 'Canceled'. This option will only be available for containers that are in a 'New' or 'In Progress' status.

Cancel: Exits the container and changes made in that session will not be saved. This screen is only available when the screen is in edit mode.

Back: Returns to the previous screen. This option is only available when the container is view only.

Print: Opens the Print dialog and allows you to select formats and print various reports and container labels. The Transfer Receiving Container report will be available on this screen. This option will always be available regardless of the receipt or container status, but it will only be available if the Transfer Receiving is configured to use containers.

Footer Button

Confirm: Moves the container in an 'In Progress' status to 'Received'.

If any containers that are over received are found, the system checks whether the user has permission to over receive based on the Allow Over Receiving <Source type> to Store ASN permission. If the user does not have this permission, they cannot over receive.

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Depending on 'Default to Shopfloor Receive' setting, the item will be received on the shop floor or back room.

The Container status is updated to ‘Received’ when there are no Damaged Quantities.

The Container status is updated to ‘Damaged’ when there are one or more Damaged Quantities

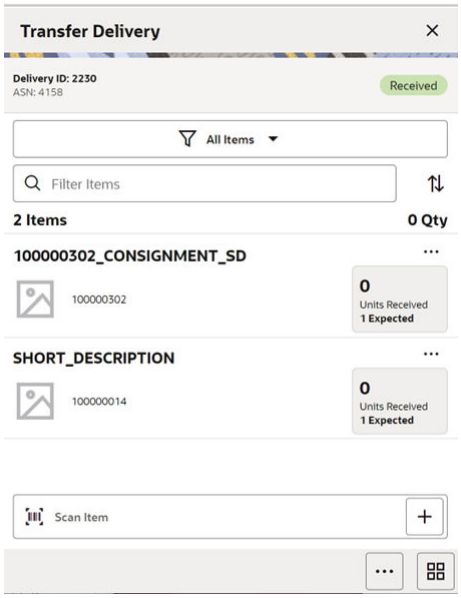
Stock on hand is updated. Total Stock on Hand and Available SOH will be incremented with the Received quantity. Total Stock on Hand and Unavailable SOH will be incremented with the Damaged quantity. If there is a customer order associated with the delivery and if reservation is required on receipt, the reservation happens for the customer order. The UINs that are received(non-damaged) will have the status updated to 'In stock' at your store.

The UINs that are received as damaged will have the status updated to 'Unavailable' at your store.

Adjust: Reopens a delivery in Completed status and moves it back to In Progress.

Transfer Delivery Items (No Container)

Figure 7-90 Transfer Delivery Items Screen



The screen is displayed when selecting a delivery/receipt that does not have containers from the Transfer Deliveries screen .

This screen is used to work with the contents and details within the delivery. Information is populated from an Advanced Shipment Notice (ASN), and you mark the items as received or damaged. The items on the list are for the delivery. The item image for the line items is displayed per configuration.

If the **Non-Inventory** indicator of the item is **No**, the SOH of the item is updated at the completion of the transaction.

If the **Non-Inventory** indicator of the item is **Yes**, the item can be added to the transaction; however, the SOH will not be updated on confirmation of the receipt. Items can be scanned/

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added to the transaction. You can enter/update quantity like a normal (inventory enabled) item. All the processing rules and validations that apply to inventory enabled items apply for non-inventoried items too, except that the validations done on quantity against SOH will be ignored. On confirmation of the receipt, the SOH of the item will not be updated since the application does not preserve the inventory details of the items with **Non-Inventory** set as **Yes**.

When the screen is set to regular receiving mode, the header bar will display the number of SKUs, 'Receiving' and total expected quantity. Scanning/entering an item will update the received quantity. When the screen is set to damage receiving mode, the header bar will display the number of SKUs, 'Damages', and total expected quantity. Scanning/ entering an item will update the damaged quantity. Finally, when the screen is set to display only discrepancies, the number of discrepancies is displayed on the left.

Line items appear in a list and selecting a line item will navigate to the item details of the item. If an item has been changed in the current session, it will be indicated by a bar on the left of the item. The filter can be used to narrow down the list of items. Filtering can occur by Item ID, Description, Expected Qty, Received Qty, and Damaged Qty..

Scanning or entering an item in the scan bar will navigate you to the Item Detail screen for the item. If the user scans the Item ID of a UIN item or scans a UIN, they will be taken to the UIN tab of the Item Detail screen.

Quantity may be updated, depending on the scan mode.

The following icons will be displayed next to the item: green circle with check indicates the item is not discrepant and the blue circle with an 'i' indicates the item is discrepant. An item is discrepant when the received quantity plus the damaged quantity does not equal the expected quantity. If configured, unexpected items may be added to the container. A new transfer will be created for the unexpected items. There will only be one transfer created for the entire receipt.

The entire container may be marked as Damaged. in that case, a reason for the damage is displayed on the Container Info screen. The container can be marked to be received on the shopfloor directly.

Receive Transfer Delivery

When the delivery is being received, the status of the delivery/receipt will move to 'In Progress' status at the receiving store. Press the **Cancel** button and the delivery/ receipt will remain as 'New'. If configured for blind receiving, the expected inbound quantities will not display.

You may select Receiving Mode as Regular to receive items in good condition or change the Receiving mode to Damages and mark items as damaged if necessary.

When confirming a delivery, the status is updated to ’Received’ and inventory is updated. The merchandising system is also notified at the container level for the receipt. This provides an up to date view.

This screen also provides an option to the user to view all items or only damaged/ discrepant/Not received/received items.

You can also default received/damaged quantity with remaining quantity using Default Received Quantities/Default Damaged Quantities, respectively. You can manually enter the received quantity using the Edit Quantity popup.

When damaged items are received, the inventory for those items will be put into a Non-sellable Unavailable bucket. The total received is the sum of the received and the damaged quantities.

Managing Discrepancies

Managing Discrepancies

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Deliveries can be received for over, short or the exact quantity dispatched. Discrepancies are easily managed with the **Display Only Discrepancies** footer menu option. When selected, the expected quantity will be compared with the received plus damaged quantity, and only the items with a discrepancy will display. Unexpected items added during the session will not show up on the discrepancy list since there is no expected quantity.

Store to Store transfer receipt overages will adjust the difference out of the sending store's stock on hand. There is not an inventory adjustment created for this overage, but an e-mail notification will be generated and sent to the sending store.

Adjust Delivery

After the delivery has been received, it is possible for a user to adjust the receipt. This will depend on the **Number of Days** received transfers can be adjusted system parameter. Select the **Adjust** button and the container moves back to 'In Progress'. The entire container is reversed out and you will need to reconfirm. The full reversal will display in Transaction History.

In some cases, the delivery may be restricted from adjustments, such as when customer order reservations exist. If the delivery has been adjusted, a check box will be marked in the Info screen. The received quantity and damage quantity fields will be populated with the same value as when the delivery had been confirmed.

The ellipsis in the lower right hand corner will access the footer menu which will contain the functions that can be performed on a container.

Footer Menu

Delivery Info: will access the Delivery Info screen.

Info: Info will access the Info (Container) screen.

Save: Saves the delivery in 'In Progress' status to be completed later. This option is only available when the screen is in edit mode.

When the container is saved, the UINs flagged as Received or Damaged and not flagged to remove are updated to 'In Receiving'

- If a UIN is flagged for removal, the UIN will be deleted if the UIN has a status of 'Unconfirmed' (this identifies the UIN as manually added).
- If a UIN is flagged for removal, the UIN receiving mode is removed if the UIN has any status other than 'Unconfirmed' (this identifies the UIN as pre-existing from an ASN).
- If an item is flagged for removal, when you save the container and returns, the item will no longer exist in the container. Note: Only unexpected items added can be removed.
- If a UIN was relocated from another store:
  - The UIN status is updated from 'In Stock' to 'In Receiving'.
  - A notification is generated and sent to the store from which the UIN was relocated.

Cancel: Exits the delivery and changes made in that session will not be saved. This screen is only available when the screen is in edit mode.

Back: Returns to the previous screen. This option is only available when the screen is view only.

Print: Opens the Print dialog and allows you to select formats and print various reports and container labels. The Transfer Receiving report will be available on this screen. This option will always be available regardless of the receipt status.

Footer Button

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Confirm: Moves the container in an 'In Progress' status to 'Received'.

If any containers that are over received are found, the system checks whether the user has permission to over receive based on the Allow Over Receiving <Source type> to Store ASN permission. If the user does not have this permission, they cannot over receive.

Depending on 'Default to Shopfloor Receive' setting, the item will be received on the shop floor or back room.

The Container status is updated to ‘Received’ when there are no Damaged Quantities.

The Container status is updated to ‘Damaged’ when there are one or more Damaged Quantities

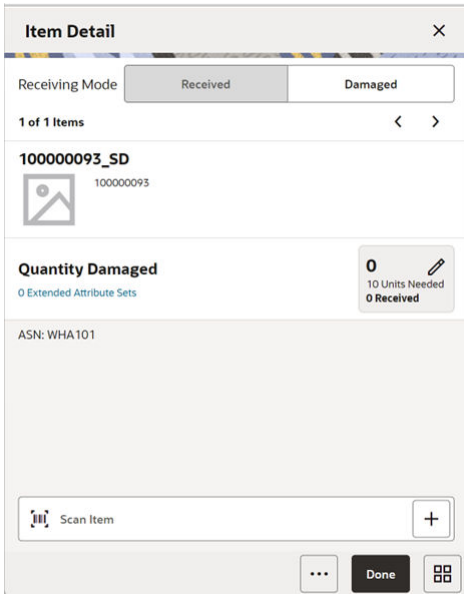
Stock on hand is updated. Total Stock on Hand and Available SOH will be incremented with the Received quantity. Total Stock on Hand and Unavailable SOH will be incremented with the Damaged quantity. If there is a customer order associated with the delivery and if reservation is required on receipt, the reservation happens for the customer order. The UINs that are received (non-damaged) will have the status updated to 'In stock' at your store.

The UINs that are received as damaged will have the status updated to 'Unavailable' at your store.

Adjust: Reopens a delivery in Completed status and moves it back to In Progress.

Item Detail

Figure 7-91 Item Detail (Container) Screen



The Item Detail screen is used when selecting or scanning an item from the Container Items/ Transfer Delivery Items screen. Scanning or entering an item on this screen in the scan bar will update the quantity per the scan mode and refresh the item detail screen for the item and quantity scanned. The quantity can be edited and updated manually if permissions allow. You can enter quantity for items with **Non Inventory** indicator as **Yes**.

The item information includes the image, which is system configured to display in the header. The screen contains the information fields: Inventory Qty, Remaining Qty, Document Qty, and

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Reason Code (for unavailable inventory only) pertaining to the bucket from which the stock is originating. Lastly, the details of the last scanned barcode will be displayed.

If the user scans the Item ID of a UIN item or scans a UIN, they will be taken to the UIN tab within the Item Detail screen, for that item.

In the UIN tab, the system displays all the UINs for the selected item, if the UINs were part of the ASN. Otherwise, the screen will remain blank until UINs are scanned/entered for the item.

When entering the screen for the first time, the status will display the following:

- The UINs included on an incoming ASN will be displayed with a status of ‘Shipped to Store’
- The UINs manually added will be displayed with a status of ‘Unconfirmed’, if they do not previously exist.
- The UINs manually added may have another status, if they already exist in the system.

When re-entering this tab after Save, the status will be updated to ‘In Receiving’ for all UINs.

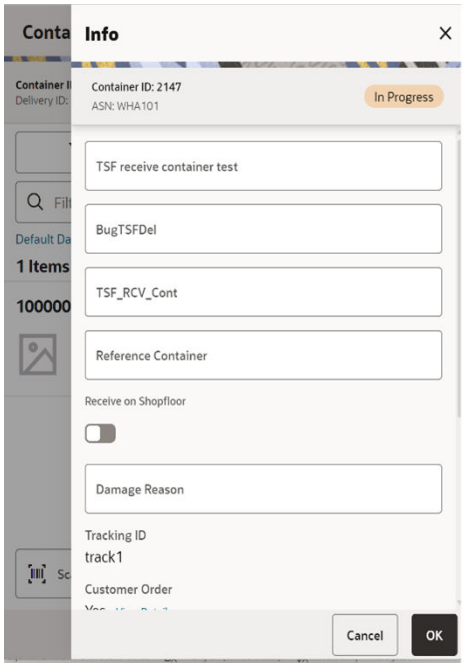
When the transaction is no longer editable, the screen will be in view only mode.

You will not have the ability to change the Receiving Mode for the UIN.

There is also an **Extended Attributes** tab that enables the user to view/capture Extended Attributes for the item. If the item is not configured to capture extended attributes or there are no extended attributes captured, the list will be empty.

Info (Container)

Figure 7-92 Info (Container) Popup



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You navigate to this screen from the footer menu on the Container Items/Transfer Delivery Items screen. The screen is used to enter details including CFAs, transportation details, Reference Container, Receive on Shopfloor, Damage Reason.

The reference container field is used to identify the original container ID and will be filled in when you have copied a container from the Misdirected Items screen. If the container was manually created, you can enter the original container ID here.

The screen also contains read only information about the header level of the container. Details include: ID, container ID, reference, ASN, status, source type and source, expected date, create date, create user, update date, update user, receive date, receive user, SSCC, tracking ID, Customer Order Details.

The **Receive on Shop Floor** option requires a bit more information and should only be available when tracking inventory on the shopfloor or back room. The default will be based on the store parameter <Source> Default to Shop floor Receiving. If set to Yes, the check box will default to marked. You are required to have Receive Direct Delivery on Shop floor permissions to change the value. This indicates whether the delivery will default to receive inventory into the shop floor instead of automatically receiving into the back room or delivery bay. If this is set to receive on the shop floor, the system increments the shop floor inventory bucket instead of the back room or delivery bay bucket.

If a capacity is defined for the item and Receive Item Capacity is set to Yes, the maximum shop floor quantity will equal the capacity; otherwise, the shop floor will be updated to the entire receipt amount. If the capacity is used and the receiving quantity is excess, the balance is incremented to delivery bay or back room depending on the Replenishment - Delivery Bay Inventory parameter. If Receive on Shopfloor is not set on the delivery, the system increments the back room or delivery bay bucket depending on the Replenishment - Delivery Bay Inventory parameter. If this parameter is on, the system will increment the delivery bay bucket instead of back room. Regardless, the stock on hand will be updated. The Receive on Shopfloor check box will only display for deliveries from a store or warehouse. For additional details, see In Store Replenishment.

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8

RTV and RTV Shipment

This chapter covers RTV and RTV shipments. It includes the following topics:

- RTV and RTV Shipment Functionality and Business Cases
- RTV and RTV Shipment MAF Mobile
- RTV and RTV Shipment JET Mobile

The return's process in the mobile application supports the retailer with the reverse logistics flow. A reverse logistic flow means that inventory is shipped out of the store to a supplier or warehouse for redistribution or disposal. This particular workflow only supports shipping inventory back to the supplier.

Some examples around reverse logistics:

- Regulatory when product has to be destroyed because of recalls.
- Return of inventory to the vendor of items that are nearing their expiration date.
- Return inventory back to the supplier because of malfunctions or poor quality.

RTV Request and Shipment MAF Mobile

RTV Request and Shipment

Return to Vendor (RTV) can be a request or a shipment.

RTV Request

A Return Request is a return to vendor that comes into the Store Inventory system from an external system. A Return Request is a request for items to be returned. You access the return request from the external system on the mobile application. The items, quantities requested to be returned and reasons (for RTV) will be listed. Enter in the return quantity approved for the items. You can also reject the request if needed. The system can be configured to allow you to add items to the return request. The system allows for items to be removed on a return request that were not initially added during the session. After the session has been saved, the quantity for the item is set to zero, similar to original requested items. Once the request has been accepted, the items are shipped to the supplier.

RTV Shipment

If the store plans to return items to the vendor, it can be done by creating an RTV shipment to the vendor. The items, quantities to be returned and reasons (for RTV) will be added to the shipment and it can be dispatched.

To create an RTV shipment, a supplier must be identified for the return; this can be done by entering in the Supplier ID or using the widget to look up a supplier.

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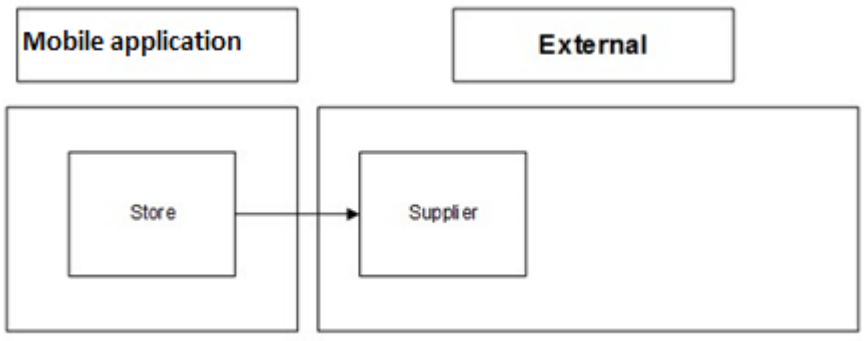
The Supplier must allow for returns. This is an indicator that is defined at the supplier level. The next validation will be to check the system setting **DSD Delivery Supplier for RTV**. This configuration (if set to Yes) requires that the supplier must also be a **DSD Supplier** (indicator on the supplier) in order to create the RTV. Lastly, if the system is configured to use **Multiple Sets of Books**, then the supplier is limited to the same operating unit as that of the store.

Items along with reasons can be added to the return. For Return to Vendors, the system allows a mix of available and unavailable inventory status items on the return; therefore, all reasons for the Return to Vendor type will be listed. All items on the return must be sourced by the supplier designated on the RTV. Authorization Number, which is required for certain suppliers, would need to be entered before dispatching.

Features:

- RTV Request and RTV shipment support shipping to the supplier.
- User can initiate a return from the mobile application by creating a shipment to the supplier.
- A single RTV shipment supports multiple containers.
- An RTV shipment can be tracked at the Container and Shipment levels.
- Container hierarchy limitations.
- BOL includes container details.
- Support for multiple users working on different containers within the same shipment.
- Each item has one or more reason codes explaining the reason it is shipped back.
- BOL captures shipment purpose, tracking ID, shipment method, destination information, and container information.
- Approval or rejection of externally-generated RTV requests.
- Authorization Return ID.
- Not after date facilitates you to ship the shipment before the shipment is expired.
- Supplier-level RTV restrictions when creating an RTV.
- Printing reports and labels.
- Capturing values for CFAs (Custom flexible Attributes) for RTV Requests, Shipments and Containers.

Figure 8-1 Supported Return Flows



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Business Cases

Two business case examples are shown below:

Damage Item Process

Two customers return DVD players that are not working. The POS transaction identifies them as damaged. This automatically associates the items to an unavailable bucket in the Store Inventory system.

The retailer creates a return to vendor for two DVD players which were damaged. They will be sent back to the vendor with a reason of Damaged using unavailable inventory.

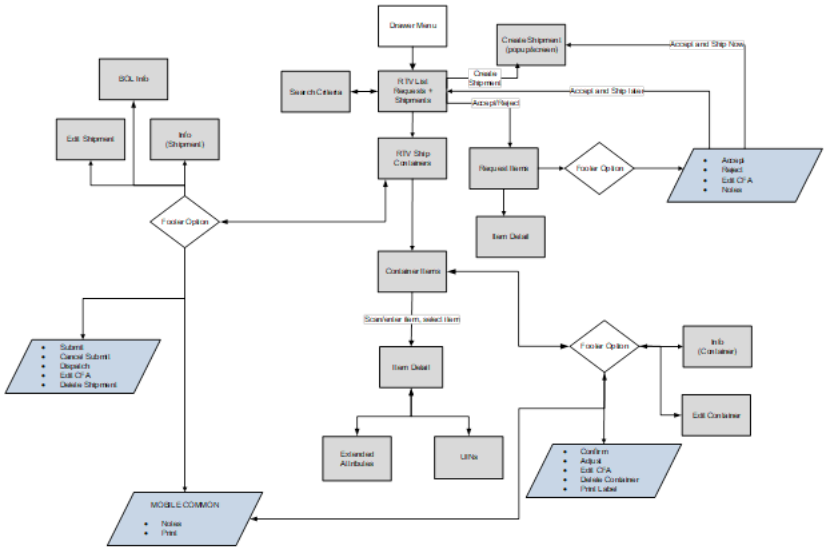
Recall Process

The Store Inventory system receives communication from the vendor requesting 100 units of chicken to be returned back to the supplier.

The store user will create the RTV shipment on the mobile application and enters the quantity to be returned; in this case, the store returns 99 units, packs the goods in a container, confirms the container and dispatches the shipment.

Screen Flow

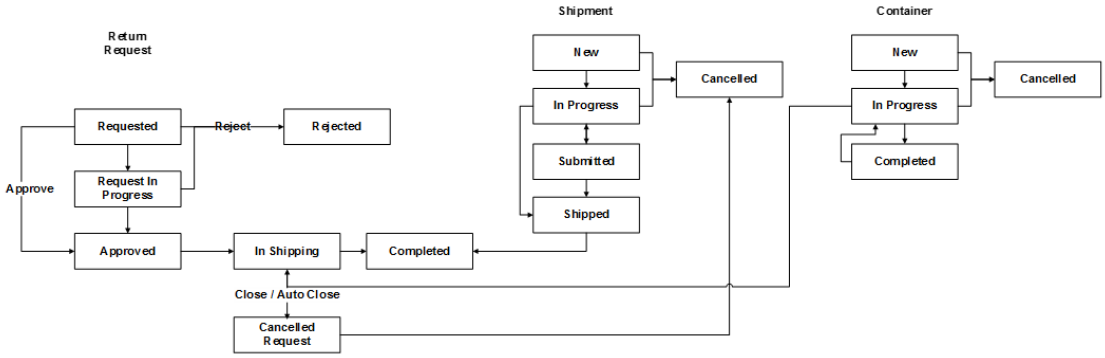
Figure 8-2 RTV and RTV Shipment Mobile Screen Flow



The RTV and RTV shipment flows exist under the Shipping/Receiving menu. From the RTV List screen, you can filter the records as needed. Both RTV requests and shipments are accessed from the RTV List screen.

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Figure 8-3 RTV and RTV Shipment Status Flow



Functionality

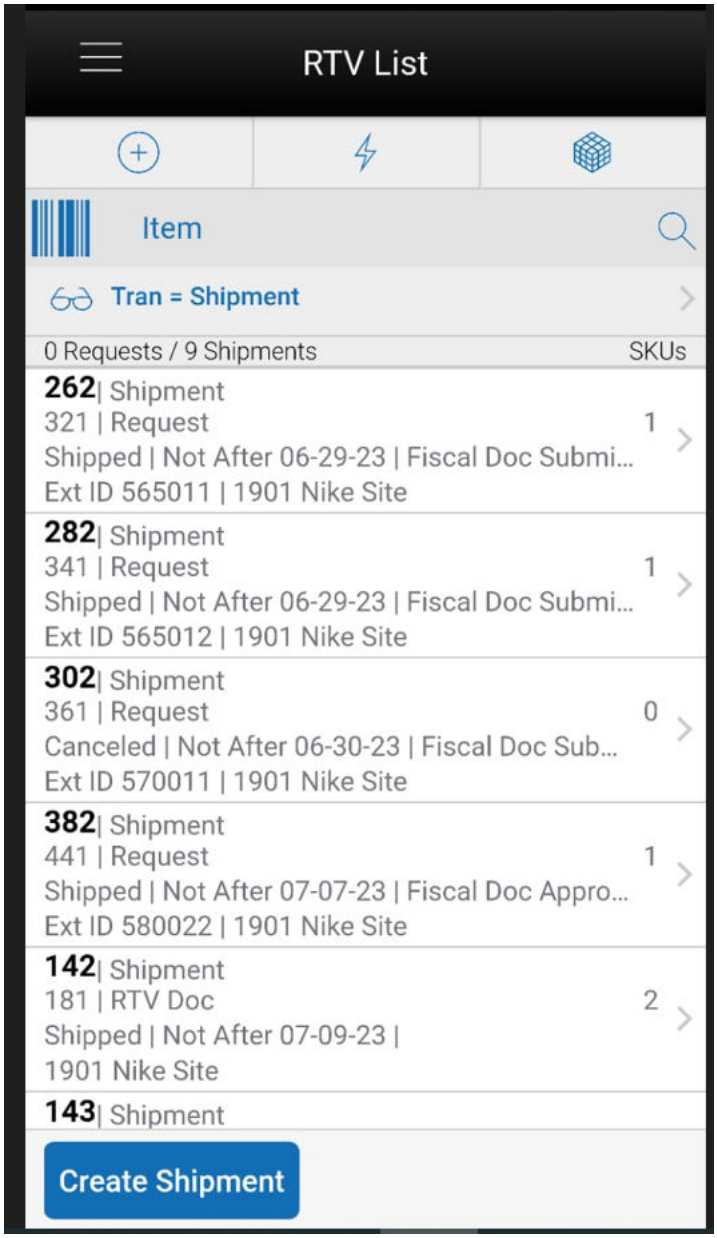
This section describes the available screens for the following functions:

- RTV List
- RTV Search Criteria
- RTV Request Items
- RTV Request Item Detail
- RTV Info
- Edit RTV
- RTV Create Shipment
- RTV Ship Containers
- Shipment Info
- BOL Detail
- Edit Shipment
- RTV Ship Container Items
- Item Detail (Container)
- RTV Container Default Item
- Container Info
- Edit Container
- Select Item
- Processing

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RTV List

Figure 8-4 RTV List Screen



The RTV List screen displays a list of externally generated RTV requests and RTV Shipments for the store the use has logged into. The RTV List screen is accessible by clicking RTV from within the Shipping and Receiving menu. The system defaults to all RTV requests and Shipments which are in 'Active' status. The Active statuses for an RTV request are any of the following statuses:

- Request In Progress
- Approved

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- Requested

The Active statuses for an RTV Shipment are any of the following statuses:

- New
- In Progress
- Submitted

This screen gives a quick view of the list of requests/shipments along with the details such as request/shipment's status, destination(supplier), Not After Date, status of the Fiscal Doc/E-way bill request (if the system is configured to use Fiscal Doc ID/E-way Bill ID), etc.

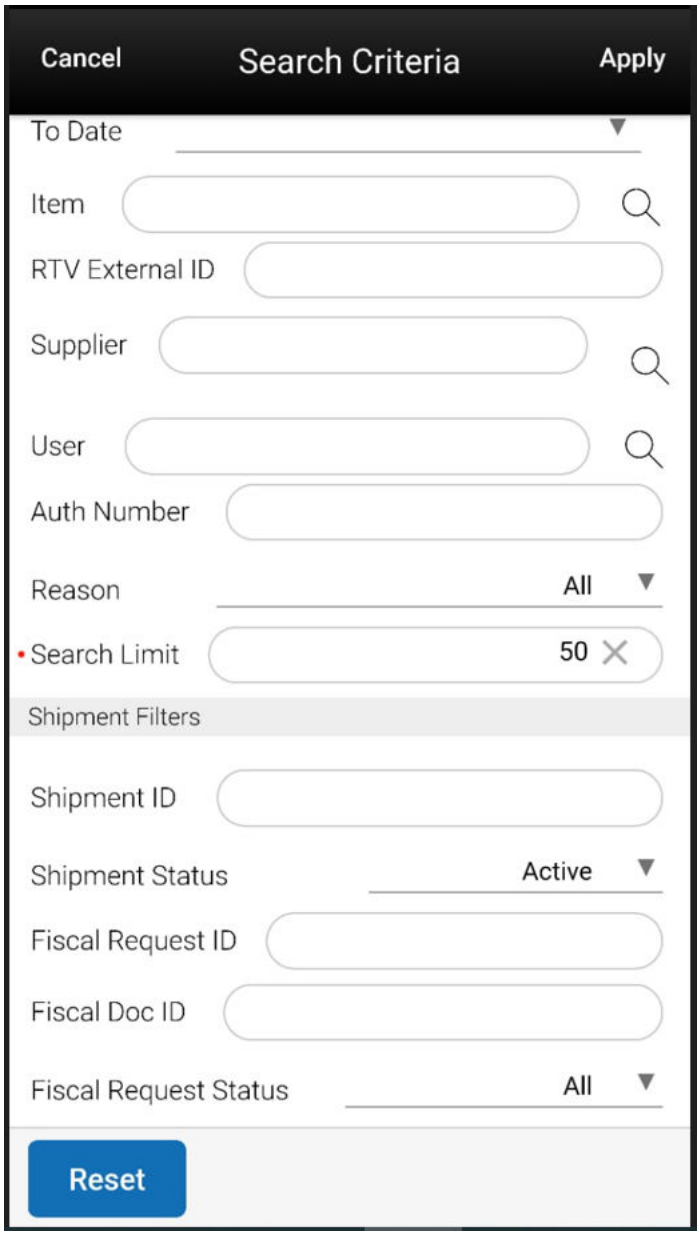
A Filter option is also available to further filter on the return and shipment records.

You can get into the details of a request or a shipment by tapping on it. You can also create a new shipment and filter records from the RTV List screen.

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RTV Search Criteria

Figure 8-5 RTV Search Criteria Screen



The Search Criteria screen is used to narrow down the list of RTV Requests and Shipments displayed on the RTV List screen. You can access this dialog by tapping on the eye glasses on the RTV list screen. This screen has three sections:

- Common Criteria
- Shipment Specific Criteria
- Request Specific Criteria

The list of criteria displayed is dependent on what you select in the 'Search for' drop-down which has options: All, Requests, Shipments. If you want to search for shipments, select

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'Shipment' from this drop-down and the search criteria applied would be 'Common search criteria' AND 'Shipment specific search criteria'. In this scenario, the Request specific criteria would not be visible to you. If you want to search for both shipments and requests together, select 'All' from 'Search for' drop-down and the search criteria applied would be ('Common search criteria' AND 'Shipment specific search criteria') OR ('Common search criteria' AND 'Request specific search criteria').

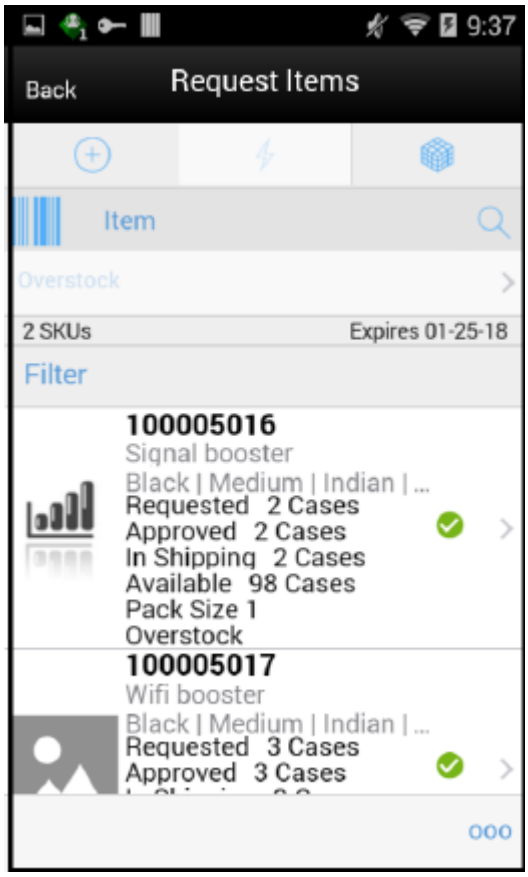
If the retailer has set up the system to use Fiscal Document/E-way bill for the RTV shipments, there will be additional criteria provided in the screen under Shipment Filters such as Fiscal Request ID, Fiscal Doc ID and Fiscal Request Status.

The result of the search is displayed in the RTV List screen.

There are pre-defined searches available as well: Active Request, Active Shipment, Active Request and Shipment.

RTV Request Items

Figure 8-6 RTV Request Items Screen



The Store Inventory system subscribes to RTV Requests from external systems that requests the store to send items back to vendor. You access the Request Items screen by selecting a request from the RTV List screen. This screen displays the list of items present in the RTV request and gives a summary of the various quantities of each item such as:

- Requested quantity

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- Approved quantity
- In Shipping quantity
- Shipped quantity
- Available quantity of the item at the source store (if the inventory to be returned has to come from Available inventory)
- Unavailable quantity of the item at the source store (if the inventory of the item has to come from Unavailable inventory)
- Items with **Non-Inventory** indicator as **Yes** are also allowed to be in the request

If sub-buckets is turned on, then the Unavailable field displays the stock for the item that is associated with the specific sub-bucket for the shipment reason code selected for the item.

Whether the screen is editable or not depends on your security permission, status of the request, Not after date. You must also have return reason code data permissions for all items on the request. You can also add items (belonging to the same supplier in the request) to be returned depending on the permissions set. Inactive/delete/discontinued status items can be added to the RTV.

The item image for the line items is displayed per configuration.

Line items appear in a list and selecting a line item navigates to the item details of that item. If an item has been changed in the current session, it is indicated by a bar on the left of the item. Scrolling in the list of items displays a filter. The filter can be used to narrow down the list of items. Filtering can occur by Item ID, Description and Reason.

Scanning or entering an item in the scan bar navigates you to the **Item Detail** screen for that item. Approved Quantity may be updated depending on the scan mode. If the user scans a VPN, a validation is done to ensure that the VPN scanned belongs to the supplier associated to the delivery.

Footer Menu

The Footer menu is accessed from the ellipsis footer menu on the Request Items screen. The menu functions include the following:

- **Info**: Accesses the Info popup.
- **Notes**: Accesses the notes dialog to capture notes.
- **Edit RTV**: To enter Auth number, and so on.
- **Default Qty**: Defaults the requested quantity to the Approved quantity field for all the items in the request.
- **Accept**: Accepts and approves the quantities to be returned. The request moves to 'Approved' status and the system will reserve inventory for the items to be returned.
- **Save**: Saves the request in 'Request In Progress' status to be completed later.

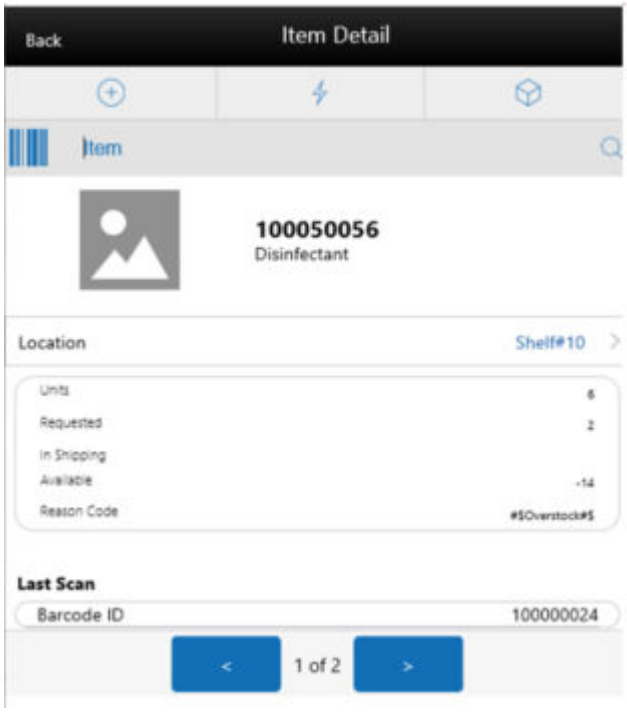
  Saving a request does not publish any message nor does it reserve any inventory; it simply saves it.
- **Reject**: This option allows you to reject the request and move the request to 'Rejected' status.
- **Edit CFAs**: Lets you enter values for the CFAs that are set up for RTV Requests.
- **Shipment**: This menu option will allow you to ship the items in the approved request or view the shipment and container details if they exist. Security exists to create, view and edit the shipment.

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- **Close RTV**: This menu option will allow you to close the RTV request. After closing an 'Approved' RTV, for the items on return, reservation would be removed and will be moved to available or unavailable depending on where it was reserved from. A message is published to the merchandising system on the inventory reversal.
- **Back**: This menu option will allow you to leave the screen. This is available when the screen is in view only mode.
- **Cancel**: Exits the screen; changes made in that session are not saved.
- **Print**: This option allows you to select formats and print various reports and container labels. The RTV report will be available on this screen. This option will always be available regardless of the return status.

RTV Request Item Detail

Figure 8-7 Item Detail Screen



The **Item Detail** screen is used when selecting or scanning an item from the **Request Items** screen. Scanning or entering an item on this screen in the scan bar updates the approved quantity per the scan mode and refreshes the Item Detail screen for the item and quantity scanned. If the user doesn't have 'Allow Over Accepting' security permission, approved Quantity cannot be greater than the requested Quantity.

If the user scans a VPN, a validation is done to ensure that the VPN scanned belongs to the supplier associated to the delivery.

The approved quantity can be edited and updated manually if permissions allow. Items with **Non-Inventory** indicator as **Yes** are also allowed to be in the transaction and you can enter approved quantity for these items.

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Whether the screen is editable or not depends on your security permission, Status of the request, Not After Date. User must also have return reason code data permissions for all items on the request.

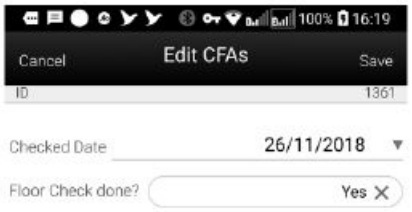
You can add items (belonging to the same supplier in the request) to be returned depending on the permissions set for him.

The item information, including the image (which is system configured), displays in the header. The bottom portion of the screen contains information fields for reason code, disposition, sub-bucket (if system configured), and the stock on hand pertaining to the bucket in which the stock is coming from, Requested quantity, In shipping and Shipped quantity. The list of locations where the item is present is also displayed in this screen, if the item is sequenced. Lastly, the Last Scan will display the details of the last scanned barcode at the bottom of the screen.

The Footer menu, ellipsis button, contains a reset function as well as Remove and Restore functions. Page through existing items on the adjustment using the arrows on the bottom.

Edit CFAs Screen

Figure 8-8 Edit CFAs

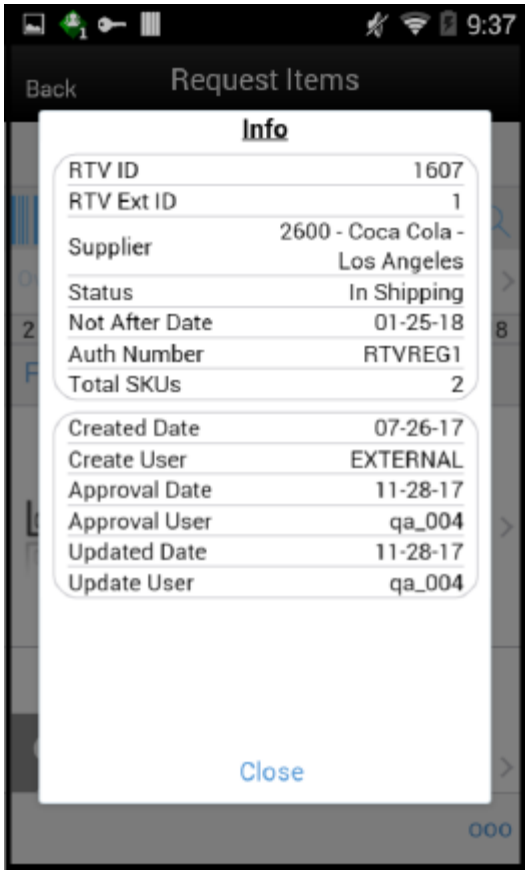


The **Edit CFAs** screen displays the list of CFAs (flexible attributes) that have been set up for RTV requests, in the desktop application and lets you enter values for them. The CFAs that are set up as **Required** must have a value entered for it before accepting the request. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed and the request must be in editable state for entering CFA values.

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RTV Info

Figure 8-9 RTV Info



The Info screen is an informational popup that contains read-only information about the header level of the request. Details include:

- RTV ID
- RTV External ID (ID generated by the external system that has created the request)
- Status
- Not After Date
- Auth Number
- Total SKUs
- Created Date
- Create User
- Approval Date
- Approval User
- User who has rejected the request
- Rejected Date

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- Close Date
- User who has closed the request
- CFAs

Edit RTV

Figure 8-10 Edit RTV Screen

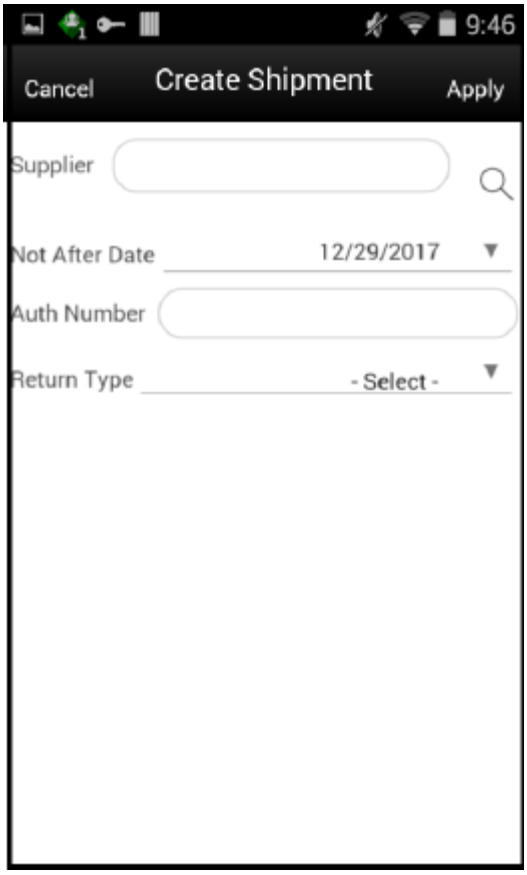


You can add or edit the Auth Number of the request using this screen. Access this screen from the Request Items screen by selecting the Edit RTV menu option in the Footer menu and needs the necessary permission to edit request details. The Status and the Not After Date are considered in order to display this screen. The status of the request must be either Requested or Request In progress, and the Not After Date must be today or later.

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RTV Create Shipment

Figure 8-11 Create Shipment Screen



This screen enables you to create a shipment in order to send back items to a vendor.

Access the RTV Create Shipment popup by tapping on the 'Create Shipment' button on the RTV List screen.

Select the supplier through the Supplier Lookup option or you can type in the Supplier ID, if known.

The Not After Date is defaulted from a parameter.

The Auth Number can be entered while creating the shipment. If not, it can be entered later while dispatching the shipment.

Select a Return Type, that is, the reason for the return. This can be configured to the business needs; some examples could be damaged goods, Invalid delivery, Seasonal.

When done, select Apply to create the RTV shipment for the supplier.

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RTV Ship Containers

Figure 8-12 RTV Ship Containers Screen



The RTV Ship Containers screen displays the list of containers for a shipment or displays an empty list of containers if the shipment is new. The screen is accessed by opening a shipment from the RTV List screen or by tapping on the 'Create Shipment' button from the RTV List screen. This is the first screen displayed in a shipment flow.

The details of a container such as Tracking ID, Total SKUs and Status are available in this screen. You can identify a container by entering or scanning Internal Container ID, SSCC ID, Tracking ID or GS1 data bar. If the system finds the container, you will be navigated to the Container Items screen where the list of items inside the container are shown.

The filter present in this screen can be used to narrow down the list of containers. Filtering can occur by Container ID (Internal ID, SSCC ID), Tracking ID and Status.

The ellipsis in the lower right hand corner accesses the Footer menu which contains all of the functions that can be performed on a shipment.

Submit

The shipment can be saved to 'In Progress' status to continue edits later or it may be set to Submitted or Dispatched. Submitting is possible when the store setting Dispatch Validate is configured for 'Ship Submit'.

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Submitting sets the shipment to a Submitted status and does not allow for edits; there are no updates to inventory at this point. You can only Cancel Submit or Dispatch.

If the system is enabled to obtain Fiscal Doc ID/E-way bill ID for the shipment, the process to request for the fiscal document, starts once the shipment is submitted.

Dispatch

When the shipment is dispatched, the RTV reserved quantity for the source location will decrease in addition to the stock on hand. If no shipping quantities are identified the transaction should be cancelled.

If the system is enabled to obtain Fiscal Doc ID/E-way bill ID as part of the shipping process, the shipment cannot be dispatched until the Fiscal Doc ID/E-way bill ID is available. The exception is when the user has ‘Allow dispatch without Fiscal Document ID’ security permission.

Footer Menu

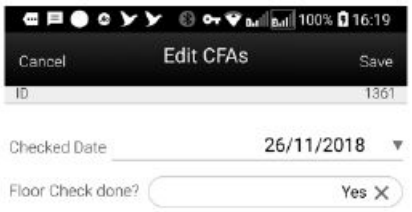
The menu functions include the following:

- **Info**: Accesses the Info popup.
- **Notes**: Accesses the notes dialog to capture notes.
- **Create**: Creates a new container in the shipment.
- **Edit Shipment**: Accesses the Edit Shipment screen where details can be added/updated.
- **Submit**: Submit performs validation for 'In Progress' shipments and locks the shipment for additional edits. The shipment will be ready for dispatch. This menu option is only available when the store parameter 'RTV Shipment Dispatch Validate' is set equal to Ship Submit.
- **Cancel Submit**: Reverses the Submit and moves the shipment back to 'In Progress'.
- **Dispatch**: Performs validation and dispatches the shipment. No further changes are allowed. The shipment is now ready to be physically shipped out of the store.
- **Edit CFAs**: Lets you enter values for the CFAs that are set up for RTV Shipments.
- **Close Shipment**: Allows you to close the rtv shipment. If there are items within these containers, reservation would be removed and will be moved to available or unavailable depending on where it was reserved from. A message is published to the merchandising system on the inventory reversal.
- **Delete**: Marks the shipment to 'Canceled' status.
- **Back**: Exits the shipment.
- **External Printing**: Displays the External Printing popup to select a printer for the pre-shipment notice and manifest documents.
- **Print**: This option allows you to select formats and print various reports and container labels. The RTV Shipment report and the BOL Detail report will be available on this screen. This option will always be available regardless of the shipment or container status.

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Edit CFAs Screen

Figure 8-13 Edit CFAs

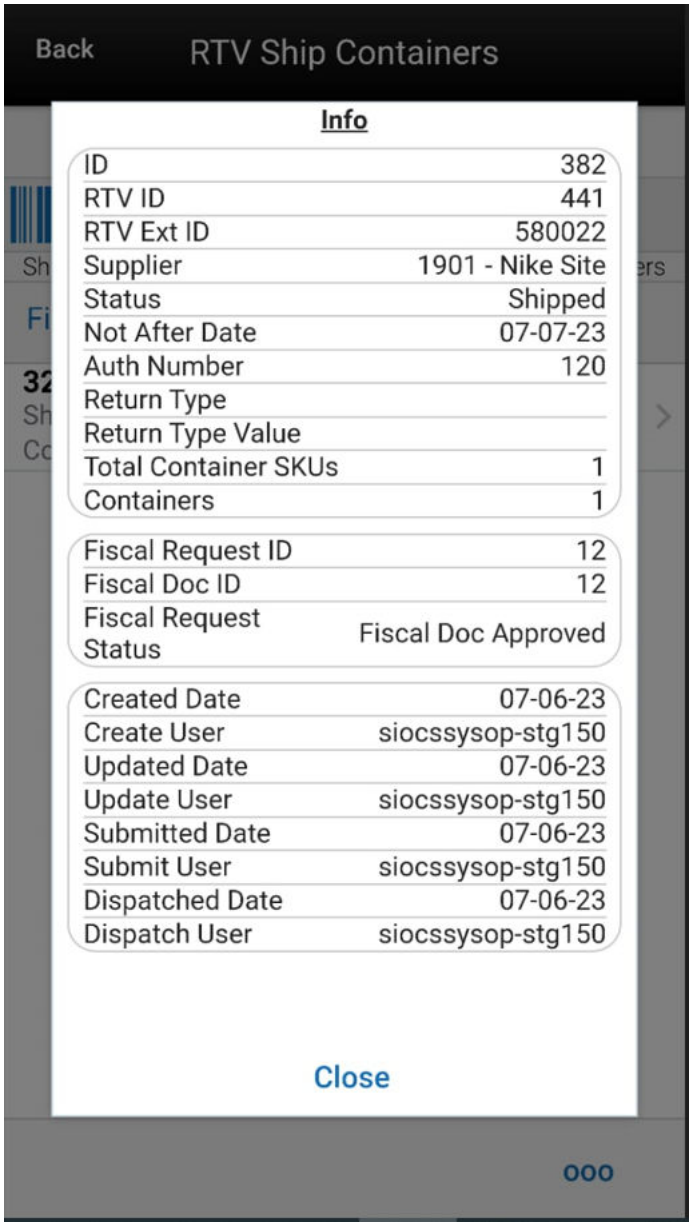


The Edit CFAs screen displays the list of CFAs (flexible attributes) that have been set up for RTV shipment, in the desktop application and lets you enter values for them. The CFAs that are set up as 'Required' must have a value entered for it before dispatching the shipment. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed and the shipment must be in editable state for entering CFA values.

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Shipment Info

Figure 8-14 Shipment Info Screen



The Shipment Info screen is accessed by clicking the Info menu option in the RTV Ship Container screen footer menu. This screen is a view only screen and lists details about the return shipment such as:

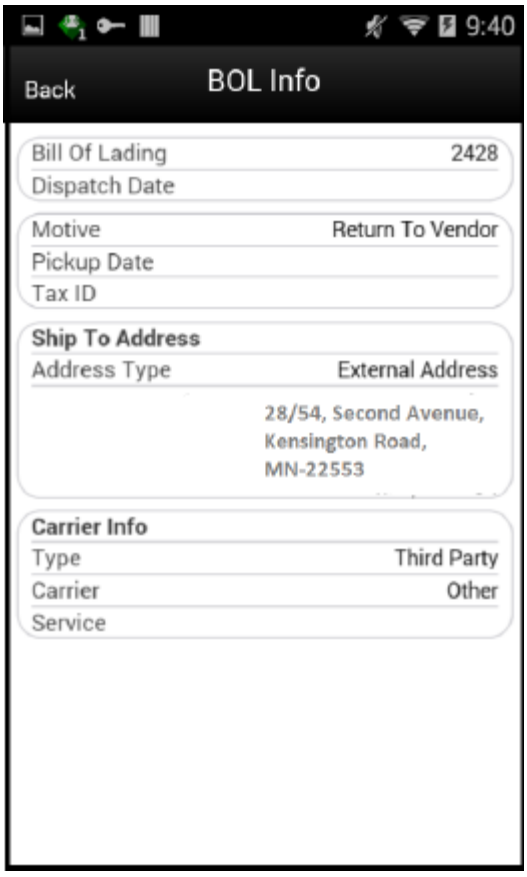
- Supplier
- Not After Date
- Auth Number
- Return Type

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- Total number of containers
- Total SKUs
- Create Date/User
- Submit Date/User
- Dispatch Date/User
- CFAs
- Fiscal Request ID, Fiscal Request Status, Reject Reason, Fiscal Doc ID, Fiscal Doc Link, if the retailer has been using Fiscal Document ID/E-way bill ID in the shipment process.

BOL Detail

Figure 8-15 BOL Info Screen



The BOL Info screen is an informational screen that contains read-only information about the carrier details for the shipment. This screen is view only and the details are managed on the Edit Shipment screen. Details include:

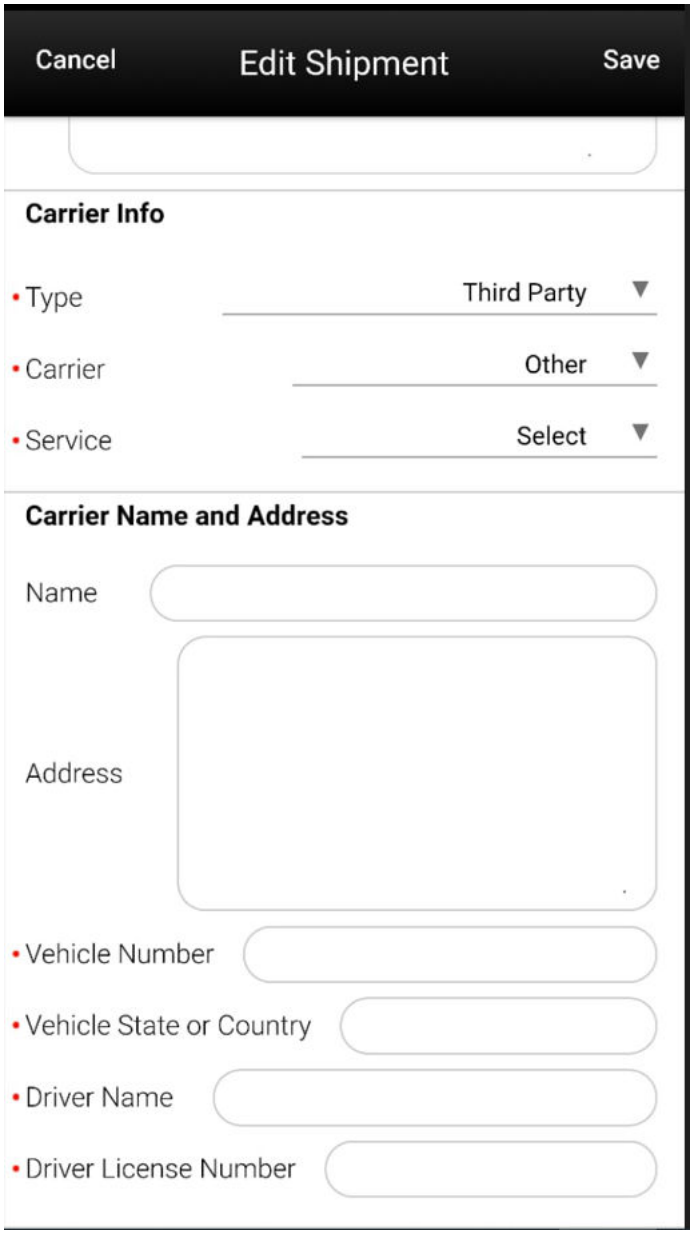
- BOL ID
- Dispatch Date
- Auth Number
- Motive

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- Pickup Date
- Ship to Address
- Carrier Type
- Carrier
- Carrier Service
- Carrier Address (if entered)

Edit Shipment

Figure 8-16 Edit Shipment Screen



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The Edit Shipment screen is used to enter details for the shipment including transportation details. Details include:

- Not After Date
- Auth Number
- Return Type
- Tax ID
- Motive
- Pickup Date
- Ship to Address
- Carrier Type: Default based on the store parameter 'RTV shipment Carrier Default' but can be modified if necessary. For carrier types of Third Party, the Service will need to be selected.
- Carrier
- Carrier Service
- Carrier Address

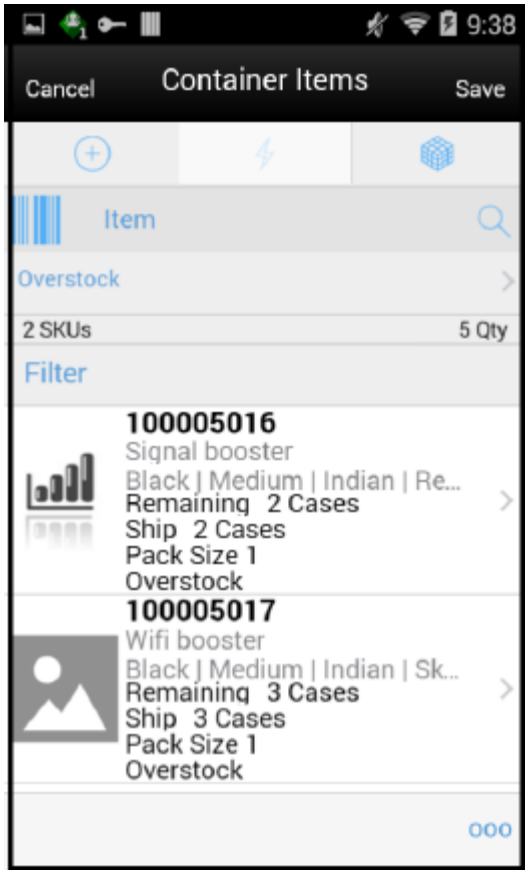
The Carrier information is locked down once the container has been confirmed. At that time, the Adjust Carrier button will be available to move the containers back to 'In Progress' to make changes to the carrier and other shipment details.

The screen also enables the user to specify details such as vehicle number and country, driver name and License number, if the retailer has been using Fiscal Document ID/E-way bill ID in the shipment process.

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RTV Ship Container Items

Figure 8-17 RTV Shipment Container Items Screen



The **RTV Shipment Container Items** screen can be reached once you tap on a container from **RTV Ship Container** screen. Many functions can be performed through this screen:

- Add items to a container with reason codes for each item. If the user scans a VPN, a validation is done to ensure that the VPN scanned belongs to the supplier associated to the delivery.
- The user will navigate to the Item Detail screen for the item scanned. If the item scanned is a UIN item, the user will navigate to the UIN tab within the Item Detail screen.
- Items and quantities can be defaulted from an approved RTV document.
- Items with **Non-Inventory Indicator** as **Yes** are also allowed to be in the transaction and you can enter ship quantity for these items.
- Item can be added to the container manually which are not on the original RTV document. UOM is selected at the Mode bar of the screen and hence applies to all the items on the container. Toggling the UOM at the Mode bar will change the UOM and convert the quantity at the line item level.
- You may choose to add notes to the container.
- You can save, confirm, and delete a container from this screen.

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- Hierarchy limitation for the container can be defined from this screen.
- UIN icon is displayed if the item is a UIN required item with Serial number or AGSN type.

Footer Menu

The menu functions include the following:

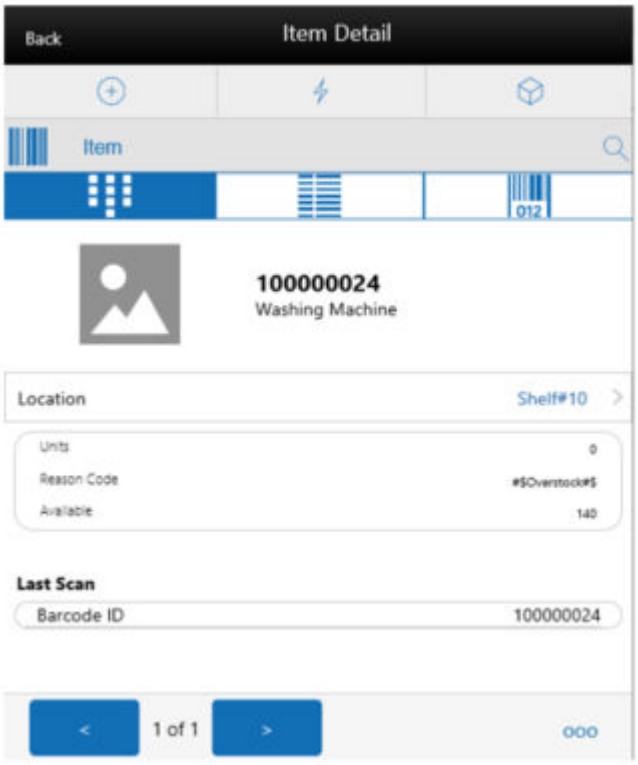
- **Info**: Accesses the Info popup.
- **Notes**: Accesses the notes dialog to capture notes.
- **Edit Container**: Allows you to enter Container ID, weight, package size, tracking id, and so on. See Edit Container story for additional details.
- **Edit CFA**s: Lets you enter values for the CFAs that are set up for RTV Shipment Containers.
- **Default Item**: Allows you to pull approved items from approved RTV documents to the shipment. This option is only available for shipments created for a return request.
- **Adjust**: Allows you to move the container back to an editable state after it has been confirmed. User needs the necessary permission to adjust a container.
- **Confirm**: Allows you to complete the container with no further edits. Appropriate security permission is necessary to confirm a container. The status of the container moves to 'Completed' status.
- **Save**: This menu option will be available on the menu when the screen is in edit mode.
- **Cancel**: Exits the screen without saving the changes made, if any. This option will be available when the screen is in edit mode.
- **Back**: This allows you to exit the screen. This menu option will be available on the menu when the screen is view only.
- **Delete**: This option will allow you to cancel the container. Reserved inventory is relieved appropriately and any RTV documents associated will set back the remaining quantities. Appropriate security permission is necessary to delete a container.

  If the container contains UIN items, the UIN state should be set back to their previous state.
- **Print**: This option allows you to select formats and print various reports and container labels. The RTV Shipment Container report will be available on this screen. This option will always be available regardless of the shipment or container status, but it will only be available if the RTV Shipment is configured to use containers.

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Item Detail (Container)

Figure 8-18 Container Item Detail Screen



The **Item Detail** screen is used when selecting or scanning an item from the **Container Items** screen. Scanning or entering an item on this screen in the scan bar updates the quantity per the scan mode and refreshes the item detail screen for the item and quantity scanned. The quantity can be edited and updated manually if permissions allow. If the user scans a VPN, a validation is done to ensure that the VPN scanned belongs to the supplier associated to the delivery. The user will navigate to the Item Detail screen for the item scanned. If the item scanned is a UIN item, the user will navigate to the UIN tab of the Item Detail screen.

Items with **Non-Inventory** indicator as **Yes** are also allowed to be in the transaction and you can enter ship quantity for these items.

The item information includes the image that is system configured to display in the header. The bottom portion of the screen contains information fields showing:

- Inventory Quantity
- Remaining Quantity
- Ship Quantity
- Reason Code
- Sub-Bucket (if sub-buckets are enabled, for unavailable inventory only) pertaining to the bucket stock is coming from.
- Last Scan will display the details of the last scanned barcode at the bottom of the screen.

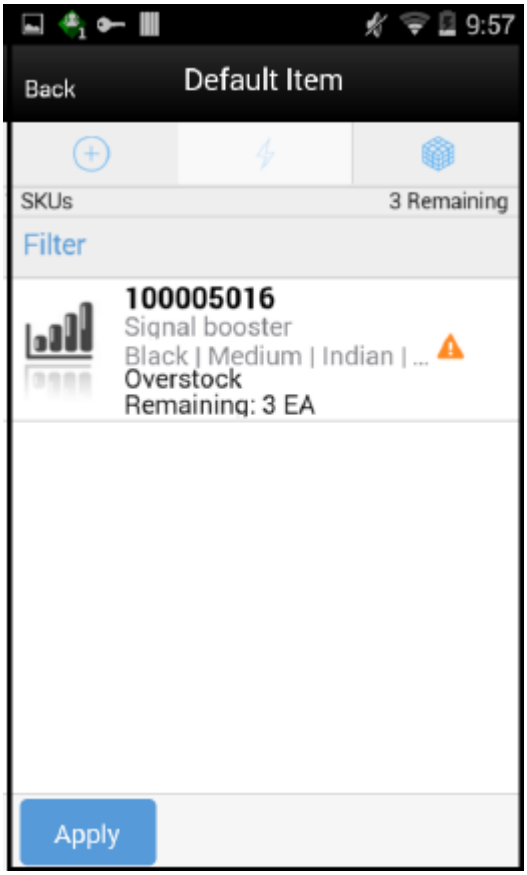
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- The UIN tab appears for you to navigate to the UIN details if the item is UIN item and the system is enabled for UIN processing for the store.
- The Extended Attributes tab enables the user to view/capture Extended Attributes for the item. If the item is not configured to capture extended attributes or there are no extended attributes captured, the list will be empty.

The Footer menu (ellipsis button), contains a **Reset** function as well as **Remove** and **Restore** functions. Page through existing items in the container using the RTV Container Default Item navigating arrows on the bottom.

RTV Container Default Item

Figure 8-19 Default Item Screen



This screen allows you to pull approved items from approved RTV requests to the shipment. This screen is accessed from the RTV Ship Container Items screen of an approved request and this is only available for shipments created for a request.

The screen defaults items into the RTV Ship Container Items screen through the 'Apply Item' and 'Apply Item and Quantity' options. Apply item will default selected items to the container, while Apply Quantity will default the selected items and the corresponding remaining quantities.

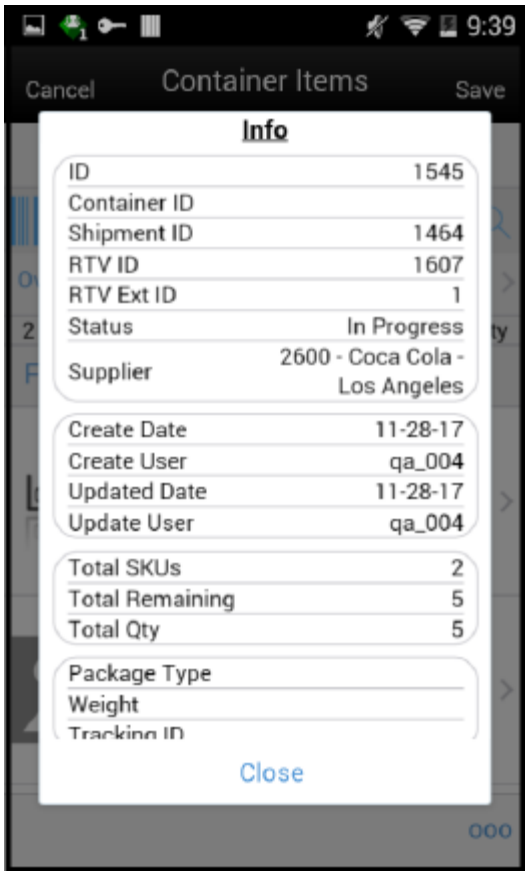
Items that fall under the frozen container hierarchy will only be applied to the container. Also, only the items that has reason codes for which you have data permissions would be applied. The container hierarchy is frozen using the 'Limit Items To' feature in the Edit Container screen.

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The remaining quantity column informs you about the quantity on the document that is not shipped yet, and can be used. The remaining quantity is not reduced until a container is confirmed for shipping.

Container Info

Figure 8-20 Container Info Screen



The Container Info pop-up appears when a user clicks the Info menu option on the Footer menu of RTV Container Items screen. The Info (Container) is an informational popup containing read-only information about the header level of the container.

Details include:

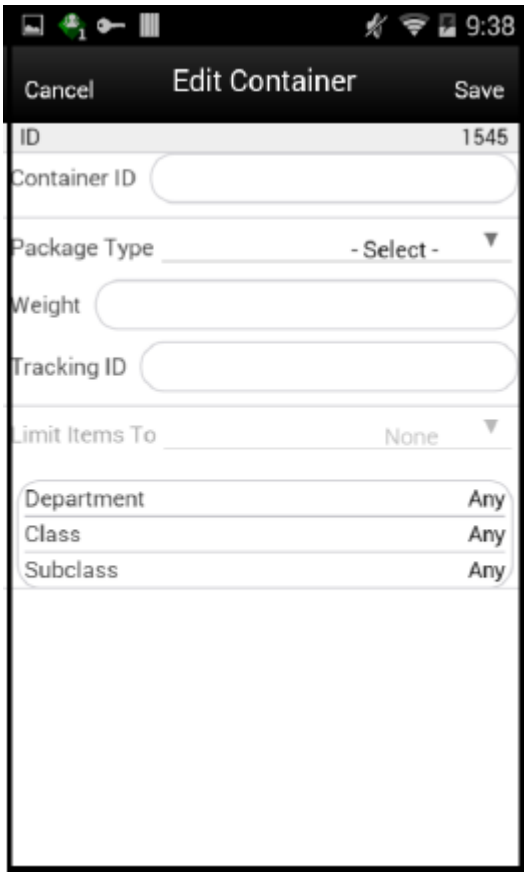
- ID
- Container ID
- Shipment ID
- RTV ID
- Status
- Supplier
- Create Date/User
- Updated Date/User

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- Approve Date/User
- Total SKUs/Remaining/Quantity
- Package Type/Weight/Tracking ID
- Container Hierarchy Limit

Edit Container

Figure 8-21 Edit Container Screen



The Edit Container screen is used to enter details for the container including transportation details. Access to this screen is from the Footer menu on the Container Items screen. Details include: ID, Container ID, Package Type, Weight, Tracking ID, and container restriction by hierarchy. The inventory status and the container restriction by hierarchy are locked down once the first item has been added to the container.

Limit Items to (Hierarchy Restriction)

If you want to set up the container to restrict the container to hold the same type of items, they can set up the container to restrict by department, class, and subclass. You do not select the actual department, but rather set the hierarchy level you want to restrict by. When the first item is added to the container, the department, class, and/or subclass is set for the container based on the hierarchy the item is part of. The container detail screen will display the hierarchy that is locked in. Any items added subsequently must match the hierarchy of the first item. For example, if the restriction was set up to limit items to the same department and the first item added was for the Women's Department, only items that match the Women's Department can

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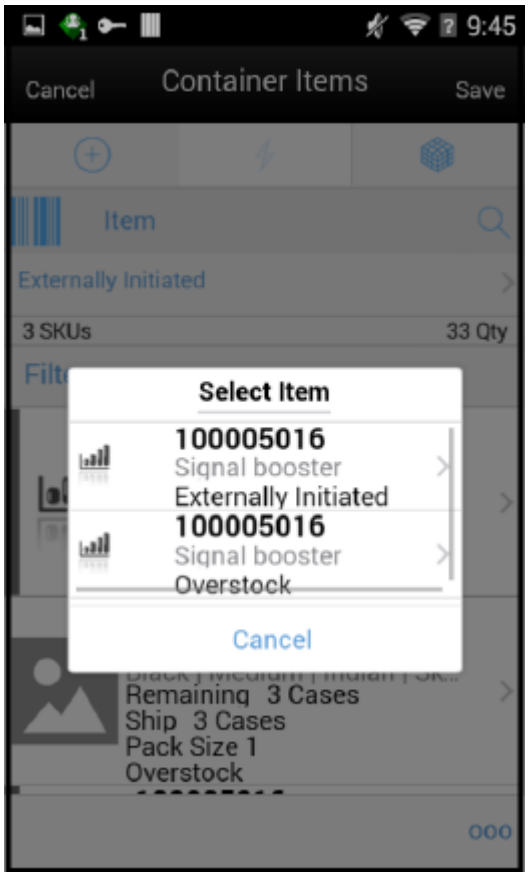
be added to the container, but it will not matter which class and subclass the item is in since the hierarchy level is set at Department.

The hierarchy level is auto defaulted depending on the permission you have been given.

If manifesting has been configured, the package type and weight may be required by the carrier selected for the shipment before you can confirm the container.

Select Item

Figure 8-22 Select Item



An Item may exist more than once in the request/shipment when the same item has been added with different reason codes.

For example, Item A is added to the request/shipment with reason codes 'Overstock' and as well as 'Externally Initiated'.

The Select Item popup is used when you scan/enter an item that exists on the transaction more than once. The list will display all instances of the scanned item along with all the different reason codes for which the item has been added. You will be able to select any item-reason code combination for the item scanned. If you wish to select a new reason code which is not used already, he can do so too.

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Processing

When a return document is saved or updated from the RTV shipment, the system moves the items from either Available or Unavailable (non-sellable) inventory, based on the inventory status, and moves it to the Reserved bucket within unavailable inventory. The Return to Vendors uses the RTV Reserved bucket. Upon dispatching of the return, the Reserved buckets will be relieved and the stock on hand will be decremented. If sub-buckets are turned on, the appropriate sub-bucket associated with the return reason will be updated when returning from unavailable inventory.

Example 1: Return to Vendor using Available Inventory

Item Lookup before:

Store A:

- Total SOH = 706
- Available SOH = 706
- Total Unavailable SOH = 0
- RTV Reserved = 0

1. The user creates an RTV to move inventory from Store A to the Vendor using available inventory.
2. The user enters a return quantity of 6 and clicks Approve.
3. A quantity of 6 is placed into the reserved bucket in both the Store Inventory system and Merchandising. Merchandising is updated through sending a mod message.
4. The retail ordering system takes into account the saved (reserved) quantity when replenishing the item through its regular ordering (auto-replenishment) process.
5. Total SOH - Non sellable (Adjustment Unavailable Qty) - Transfer reserved quantity - RTV reserved quantity - Customer Reserved Qty = Available Quantity

   Store A:

   - Total SOH = 706
   - Available SOH = 700
   - Total Unavailable = 6
   - RTV Reserved = 6

   > **Note**
   >
   > Unavailable is a total of all sub-buckets.

6. Modify Return Qty to 8 and click Dispatch.

   Item Lookup:

   - Total SOH = 698
   - Available = 698
   - Unavailable = 0
   - Reserved Qty = 0

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Example 2: Return to Vendor using Unavailable Inventory

Item Lookup before:

Item Lookup	Database
Total SOH = 800	RTV_Quantity =0
Available = 700	Nonsellable (Adjust Unavail) = 100
Unavailable = 100	
Nonsellable = 100; Sub-bucket: Trouble 75, Admin 25	
RTV Qty = 0	

1. The user creates a shipment and enters a return quantity of 10 (unavailable) and clicks Save.

Item Lookup	Database
Total SOH = 800	RTV_Quantity =10
Available = 700	Nonsellable (Adjust Unavail) = 90
Unavailable = 100	
Nonsellable = 90; Sub-bucket: Trouble 65, Admin 25	
RTV Qty = 10	

> **Note**
>
> The available quantity will still display as 700 on the UI and reports.

2. Modify Return Qty to 12 and click Dispatch.

   Item Lookup:

   - Total SOH = 788
   - Available =700
   - Unavailable = 88
   - Nonsellable = 88; Sub-bucket: Trouble 63, Admin 25
   - RTV Qty = 0

RTV and RTV Shipment (JET Mobile)

The return's process in the mobile application supports the retailer, using the reverse logistics flow. A reverse logistic flow means that inventory is shipped out of the store to a supplier or warehouse for redistribution or disposal. This particular workflow only supports shipping inventory back to the supplier.

Some examples of reverse logistics:

- Regulatory, when product has to be destroyed because of recalls.

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- Return of inventory to the vendor of items that are nearing their expiration date.
- Return inventory back to the supplier because of malfunctions or poor quality.

This chapter is split into four sections:

- RTV and RTV Shipment
- Business Cases
- Screen Flow
- Functionality

RTV

Return to Vendor (RTV) can be a request from an external system or a return created by the store.

RTV

An RTV can be created by the store to return items to a vendor. The user adds the items to be returned with the quantity to be returned and approves the RTV. Once approved, the items can be shipped. This is the document the user will ship against.

RTV Request

A Return Request is a return to vendor that comes into the Store Inventory system from an external system. It t is a request for items to be returned. You access the return request from the external system on the mobile application. The items, quantities requested to be returned and reasons (for RTV) will be listed. Enter in the return quantity approved for the items.

You can also reject the request if needed. The system can be configured to allow you to add items to the return request. The system allows for items to be removed on a return request that were not initially added during the session. After the session has been saved, the quantity for the item is set to zero, similar to original requested items. Once the request has been accepted, the items are shipped to the supplier.

> **Note**
>
> After approval, the RTV request or RTV will act the same way.

RTV Shipment

Shipments are the physical movement of the goods to the supplier. Theycan be created in the following ways:

- After an RTV request from an external system is accepted, a shipment is created for the RTV request.
- After an RTV is created at the store and approved, a shipment is created for the RTV.
- On the fly shipment

The items, quantities to be returned and reasons will be added to the shipment and it can be dispatched without first creating an RTV document or approving an RTV request.

When creating, editing, or viewing a shipment with containers, you are directed to the list of containers within the shipment on the Containers screen. Here, you can create, edit or view a

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container. When creating, editing or viewing a container, you are directed to the list of items in the container on the Container Items screen. You can add, view, and edit the details of the items on this screen as well as on the Item Detail screen.

When creating, editing, or viewing a shipment without containers, you are directed to the RTV Shipment Items screen, where the items to be shipped and their details can be added.

Submit

The shipment can be saved in 'In Progress' status to continue edits later or it can be submitted or dispatched. Submitting is possible when the store setting 'Dispatch Validate' is configured for 'Ship Submit'. Submitting will set the shipment to a 'Submitted' status and not allow for edits; there are no updates to inventory at this point. The only step possible will be to Cancel Submit or Dispatch. If the system is enabled to obtain Fiscal Doc ID/E-way bill ID for the shipment, the process to request for the same starts once the shipment is submitted.

Dispatch

When the shipment is dispatched, the RTV reserved quantity for the store will decrease, as well as the stock on hand. If the system is enabled to incorporate Fiscal Doc ID/E-way bill ID as part of the shipping process, the shipment cannot be dispatched until the Fiscal Doc ID/E-way bill ID is available. The exception is when the user has ‘Allow dispatch without Fiscal Document ID’ security permission.

Features Available

- The user can accept or reject a return request from an external system through the mobile application. A shipment can be created after a request is accepted.
- The user can initiate a return from the mobile application, approve it and then can create a shipment to the supplier.
- The user can initiate a return from the mobile application by creating a shipment to the supplier.
- Shipments can be created, submitted and dispatched with or without containers.
- A single RTV shipment can support multiple containers or be restricted to just one container.
- An RTV shipment can be tracked at the Container and Shipment levels.
- Container hierarchy limitations.
- BOL (Bill of Lading) includes container details.
- Support for multiple users working on different containers within the same shipment.
- Each item has one or more reason codes explaining the reason it is shipped back.
- BOL captures shipment purpose, tracking ID, shipment method, destination information and container information.
- Authorization Return ID.
- 'Not after date' lets you send the shipment before it is expired.
- Supplier-level RTV restrictions when creating an RTV.
- Printing reports and labels.
- Capturing values for CFAs (Custom flexible Attributes) for RTVs, Shipments and Containers.
- Ship only when the Fiscal Document ID is available if the business process demands.

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To create an RTV and an RTV shipment, a supplier must be identified for the return; this can be done by entering in the Supplier ID or using the widget to look up a supplier.

The Supplier must allow for returns. This is an indicator that is defined at the supplier level. The next validation will be to check the system setting DSD Delivery Supplier for RTV. This configuration (if set to Yes) requires that the supplier must also be a DSD Supplier (indicator on the supplier) in order to create the RTV.

> **Note**
>
> If the system is configured to use Multiple Sets of Books, then the supplier is limited to the same operating unit as that of the store.

Items, along with reasons, can be added to the return. For Return to Vendors, the system allows a mix of available and unavailable inventory status items on the return; therefore, all reasons for the Return to Vendor type will be listed.

All items on the return must be sourced by the supplier designated on the RTV. Authorization Number, which is required for certain suppliers, must be entered before dispatching.

Business Cases

Two business case examples are shown below:

Damage Item Process

Two customers return DVD players that are not working. The POS transaction identifies them as damaged. This automatically associates the items to an unavailable bucket in the Store Inventory system.

The retailer creates a return to vendor for two DVD players which were damaged. They will be sent back to the vendor with a reason of Damaged using unavailable inventory.

Recall Process

The Store Inventory system receives communication from the vendor requesting 100 units of chicken to be returned to the supplier.

The store user creates the RTV shipment on the mobile application and enters the quantity to be returned. In this case, the store returns 99 units, packs the goods in a container, confirms the container and dispatches the shipment.

Screen Flows

The RTV and RTV shipment flows exist under the Shipping/Receiving menu. From the RTVs screen, you can filter the records as needed. RTV requests, RTVs and shipments are accessed from the RTVs screen.

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Figure 8-23 RTV Mobile Screen Flow

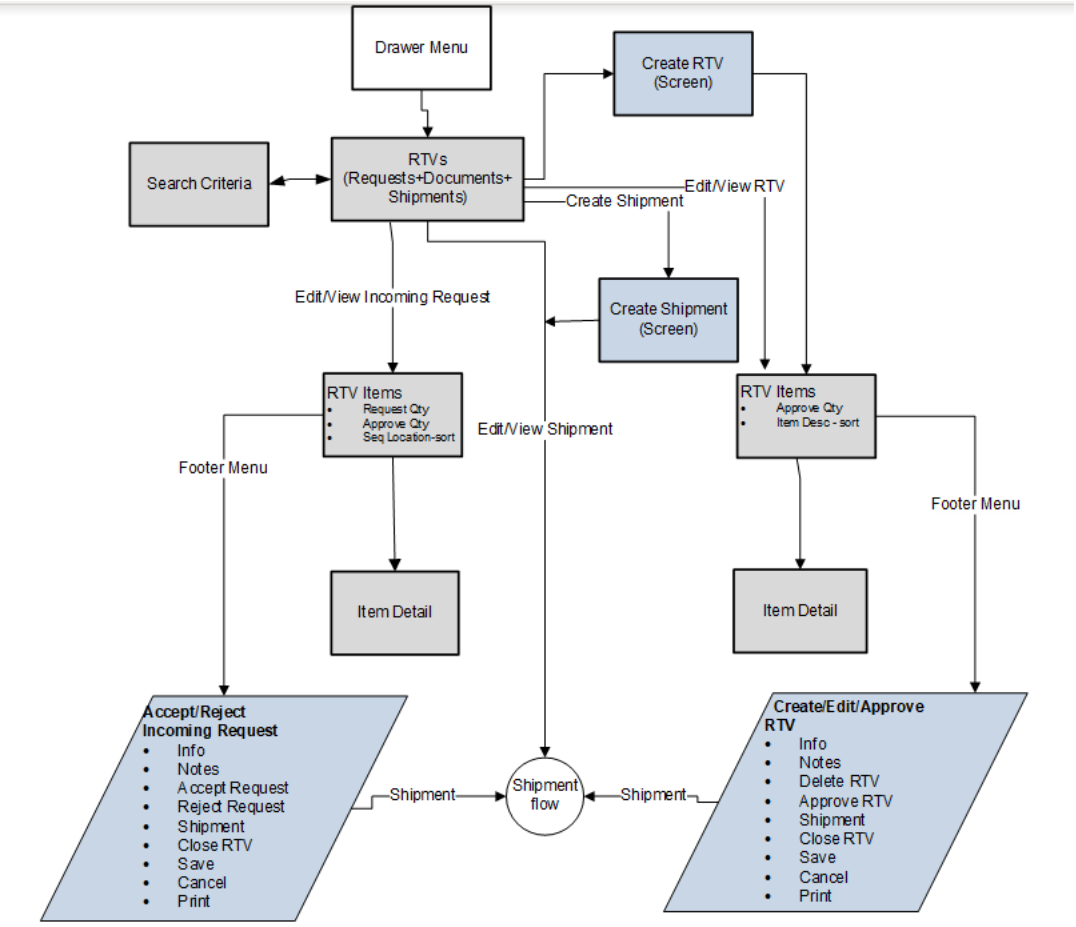
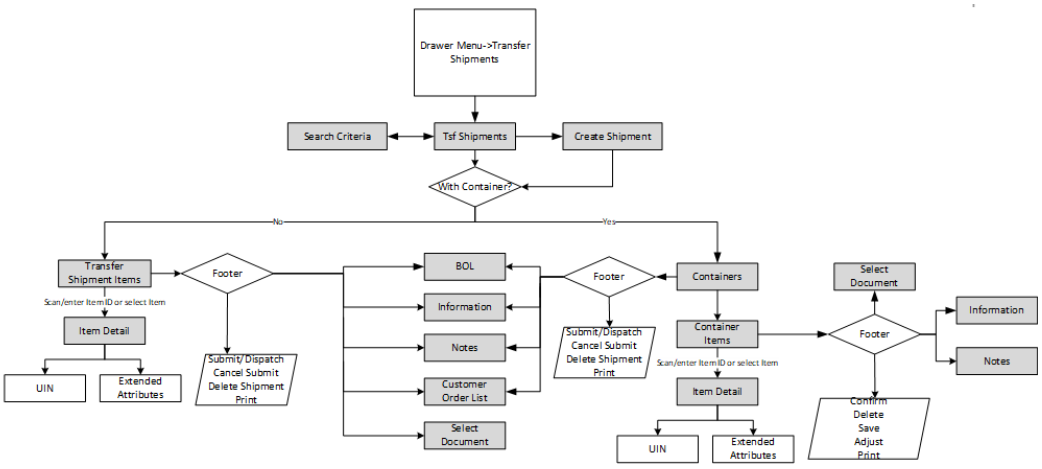
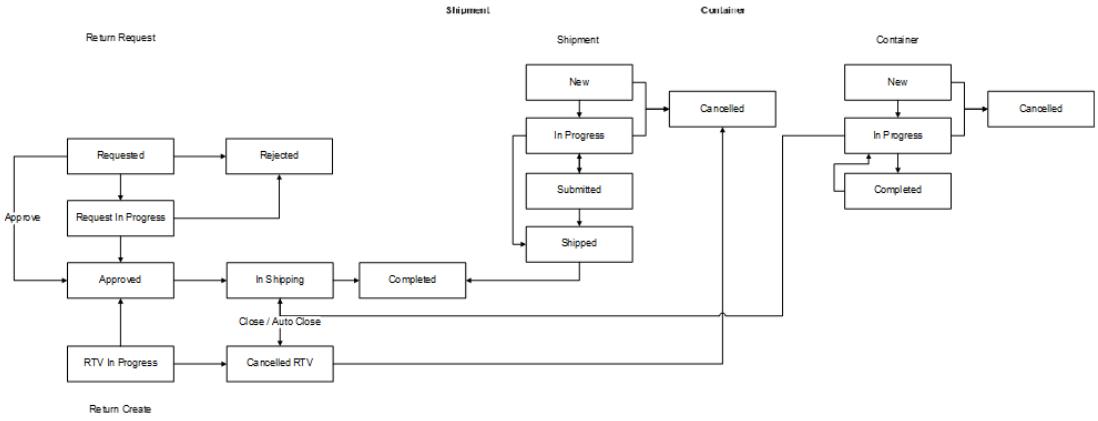


Figure 8-24 RTV Shipment Mobile Screen Flow



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Figure 8-25 RTV and RTV Shipment Status Flow



Functionality

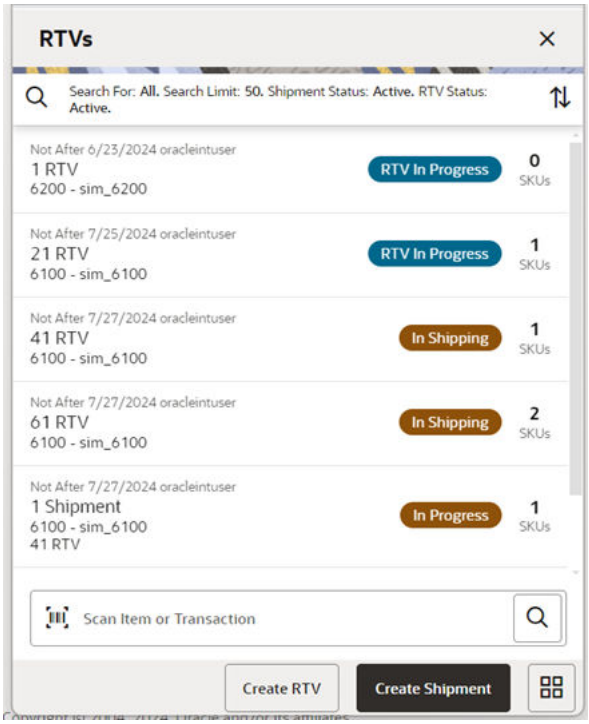
This section describes the available screens for the RTV and RTV Shipment JET Moblie feature:

- RTVs
- RTV Search Criteria
- Create RTV
- RTV Items (Store-Created RTV)
- RTV Items (External Request)
- RTV Item Detail Store-Created RTV)
- RTV Item Detail (External Request)
- Info (RTV)
- Create Shipment
- Containers
- Shipment Info
- Bill of Lading
- Container Items
- RTV Shipment Items (without Container)
- Item Detail
- Info (Container)

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RTVs

Figure 8-26 RTVs Screen



The RTVs screen displays a list of externally generated RTV requests and stores created RTVs and RTV Shipments for the store the user has logged into. The RTVs screen is accessible by clicking RTV from within the Shipping and Receiving menu and also from the Quick Actions screen. The system defaults to all RTV requests, RTVs and Shipments which are in 'Active' status. The Active statuses for an RTV request/RTV are any of the following:

- Requested
- Request in Progress
- RTV in Progress
- Approved

The Active statuses for an RTV Shipment are any of the following:

- New
- In Progress
- Submitted

This screen gives a quick view of the list of requests, RTVs and shipments, along with the details such as Not After Date, User, ID, status, supplier, External ID, status of the Fiscal Doc/E-way bill request (if the system is configured to use Fiscal Doc ID/E-way Bill ID) and so on.

A Search option is also available to further filter on the return and shipment records.

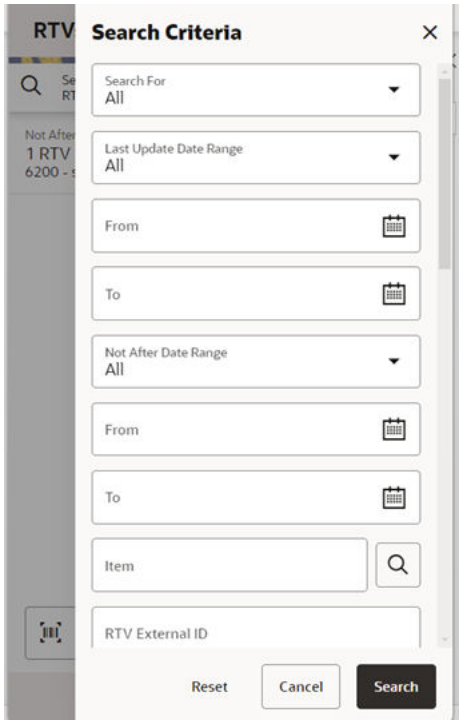
You can view the details of a request, RTV or shipment by tapping on it. You can also create a new RTV or a new shipment from this screen using the footer buttons. The Create Shipment is

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available if the user has the Create AdHoc RTV Shipment permission. Lastly, the user can filter records from the screen using the scan bar.

RTV Search Criteria

Figure 8-27 RTV Search Criteria Screen



The Search Criteria screen is used to narrow down the list of RTV Requests/RTVs and Shipments displayed on the RTVs screen. You can access this dialog by tapping on the magnifying glasses on the RTVs screen. This screen has three sections:

- Common Criteria
- Shipment Specific Criteria
- RTV Specific Criteria

The list of criteria displayed is dependent on what you select in the 'Search for' drop-down, which has these options: All, RTVs and Shipments.

If you want to search for RTVs(requests and RTVs), select ‘RTVs’ from this drop-down The search criteria applied would be 'Common search criteria' AND ‘RTV specific search criteria'. In this scenario, the Shipment specific criteria would not be visible to you. If you want to search for both shipments and RTVs together, select 'All' from 'Search for' drop-down and the search criteria applied would be ('Common search criteria' AND 'Shipment specific search criteria') OR ('Common search criteria' AND RTV specific search criteria').

If you want to search for shipments, select 'Shipment' from this drop-down and the search criteria applied would be 'Common search criteria' AND 'Shipment specific search criteria'. In this scenario, the RTV specific criteria (RTV Status) would not be visible to you.

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If you want to search for both shipments and RTVs together, select 'All' from 'Search for' drop-down and the search criteria applied would be ('Common search criteria' AND 'Shipment specific search criteria') OR ('Common search criteria' AND RTV specific search criteria').

If the retailer has set up the system to use Fiscal Document/E-way bill for the RTV shipments, there will be additional criteria provided in the screen under Shipment Filters, such as Fiscal Request ID, Fiscal Doc ID and Fiscal Request Status.

Common Criteria:

- Search For: RTVs, Shipments, and All
- Last Updated Date Range
- Not After Date Range
- Item
- RTV ID
- RTV External ID
- Supplier
- Authorization Code
- Reason
- User
- Search Limit

RTV Specific Criteria

- RTV Status

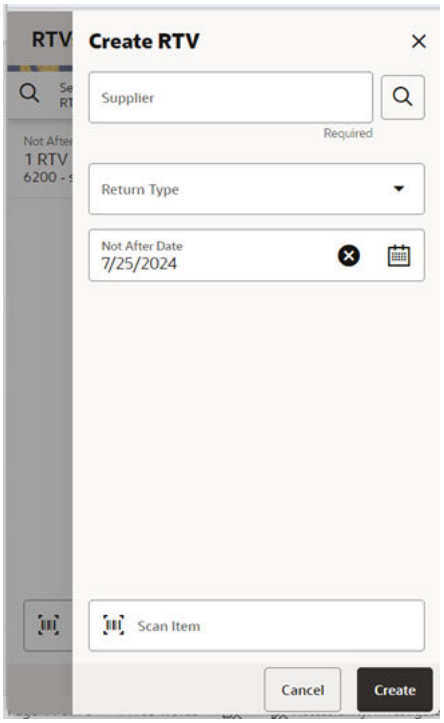
Shipment Specific Criteria

- Shipment ID
- Shipment Status
- Container ID
- External Container ID
- Tracking ID
- Fiscal Doc ID
- Fiscal Request ID
- Fiscal Request Status

Create RTV

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Figure 8-28 Create RTV Screen



A store can create an RTV by clicking on the ‘Create RTV’ footer button in the RTVs screen.

The user should enter the ID of the supplier to which the items have to be returned. There is an option available to look up the supplier if the ID is not known.

- First, the Supplier must be configured for Returns Allowed.
- If the store parameter, ‘DSD Supplier for RTV’ is set to ‘Yes,’ then the DSD Indicator on the supplier must also be ‘Yes.’
- The Supplier must be in ‘Active’ status
- Multiple sets of books are enforced, meaning the org unit for the supplier must be the same as that of the store.

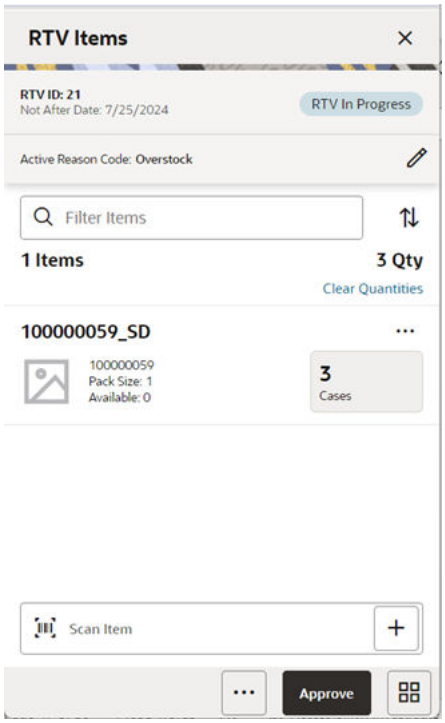
The user can select the ‘Return Type’ if needed (configured on the desktop).The ‘Not After Date’ field must be set if the store wants the items to be shipped by a specific date

Once the RTV is created, the user will be taken to RTV Items screen to add the items and the quantity to be returned for each item. The RTV must be approved at the store for it to be shipped.

RTV Items (Store-Created RTV)

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Figure 8-29 RTV Items Screen



You access this screen by selecting 'Create' from the Create RTV screen or by opening an RTV in status 'RTV In Progress' or 'Approved' from the RTVs screen. While creating a new RTV, this screen enables you to specify items to be returned and enter a return quantity for each item. For an existing RTV, this screen displays the list of items present in the RTV and gives a summary of the various quantities of each item such as:

- Quantity – the approved quantity for the item across all reason codes
- In Shipping quantity
- Shipped Quantity
- Available quantity of the item at the source store (if the inventory to be returned has to come from Available inventory)
- Unavailable quantity of the item at the source store (if the inventory of the item has to come from Unavailable inventory)

> **Note**
>
> When using sub buckets, unavailable inventory on an RTV is different from the RTV shipment. In the shipment the reason code will look at specific sub buckets, while on the RTV, SIOCS will look at the total unavailable quantity.

Whether the screen is editable or not depends on your security permission and the status of the RTV, Not after date. The user must also have the return reason code data permissions for all items on the request. It is also possible to add items (belonging to the same supplier in the request) to be returned depending on the permissions set. Inactive/delete/discontinued status items can be added to the RTV. Items with **Non-Inventory** indicator as **Yes** are also allowed to be in the RTV.

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The item image for the line items is displayed per configuration.

Line items appear in a list, and selecting a line item navigates to the item details of that item. Scrolling in the list of items displays a filter. The filter can be used to narrow down the list of items. Filtering can occur by Item ID, Description and Reason.

Scanning or entering an item in the scan bar navigates you to the **Item Detail** screen for that item. Approved Quantity may be updated depending on the scan mode. If the user scans a VPN, a validation is done to ensure that the VPN scanned belongs to the supplier associated to the delivery.

The user can sort the items based on various options such as Item ID and Item Description.

When adding items, the user has to select a reason code. For easier usability, a default reason code can be selected. This reason code will default when the item is added. Changing it will not change reason codes already associated to an existing item. The user will have to change the item level reason individually.

Footer Menu

The Footer menu is accessed from the ellipsis footer menu on the Request Items screen. The menu functions include the following:

- **Info**: Accesses the Info popup to enter CFAs, Authorization code, view details of the RTV and so on.
- **Notes**: Accesses the notes dialog to capture notes.
- **Save and Exit**: Saves the RTV in ‘RTV In Progress’ status to be completed later.

  Saving an RTV does not publish any message nor does it reserve any inventory; it simply saves it.
- **Shipment**: This menu option will allow you to ship the items in the approved RTV or view the shipment details if they exist. Security exists to create, view and edit the shipment
  - The shipment will be created with or without container.
  - If the user has permission, Allow Modify Default Container Method, they will be able to select/modify the container method. The container method is defaulted per the ‘Create Vendor Shipment with Container by Default’ store configuration.
  - The user navigates to the RTV Shipment.
- **Close RTV**: This menu option will allow you to close the RTV. After closing an 'Approved' RTV, for the items on return, reservation is removed and will be moved to available or unavailable, depending on where it was reserved from. A message is published to the merchandising system on the inventory reversal.
- **Back**: This menu option will allow you to leave the screen. This is available when the screen is in view only mode.
- **Cancel**: Exits the screen; changes made in that session are not saved.
- **Print**: This option allows you to select formats and print various reports and container labels. The RTV report will be available on this screen. This option will always be available regardless of the return status.

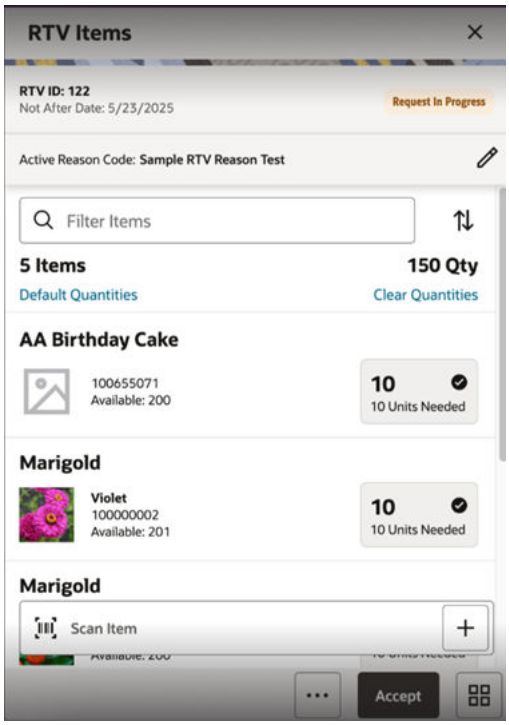
Footer Button

- **Approve**: Approves the quantities to be returned. The request moves to 'Approved' status and the system updates the reserved inventory for the items to be returned.

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RTV Items (External Request)

Figure 8-30 RTV Items Screen



The Store Inventory system subscribes to RTV Requests from external systems. The request indicates to the store which items and quantities to send back to the vendor. The user accesses the screen by selecting a request from the RTVs screen. This screen displays the list of items present in the RTV request and gives a summary of the various quantities of each item such as:

- Quantity – the approved/accepted quantity
- Requested quantity
- In Shipping quantity
- Shipped quantity
- Available quantity of the item at the source store (if the inventory to be returned has to come from Available inventory)
- Unavailable quantity of the item at the source store (if the inventory of the item has to come from Unavailable inventory)

> **Note**
>
> When using sub buckets, unavailable inventory on an RTV is different from the RTV shipment. In the shipment the reason code will look at specific sub buckets, while on the RTV, SIOCS will look at the total unavailable quantity.

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Whether the screen is editable or not depends on your security permission, status of the request and Not after date. The user must also have return reason code data permissions for all items on the request. They can also add items to the return depending on the permissions set, as long as these items are also supplied by the same supplier for whom the RTV request is created.. Inactive/delete/discontinued status items can be added to the RTV. Items with **Non-Inventory** indicator as **Yes** are also allowed to be in the request.

The item image for the line items is displayed per configuration.

Line items appear in a list and selecting a line item navigates to the item details of that item Scrolling in the list of items displays a filter. The filter can be used to narrow down the list of items. Filtering can occur by Item ID, Description and Reason.

Scanning or entering an item in the scan bar navigates you to the Item Detail screen for that item. Approved Quantity may be updated depending on the scan mode. If the user scans a VPN, a validation is done to ensure that the VPN scanned belongs to the supplier associated to the delivery.

The user can default the requested quantity to the Approved quantity field for all the items in the request and they can also sort the items based on various options such as Item ID and Item Description.

When adding items, the user has to select a reason code. For easier usability, a default reason code can be selected. This reason code will default when the item is added. Changing it will not change reason codes already associated to an existing item. The user will have to change the item level reason individually.

Footer Menu

The Footer menu is accessed from the ellipsis footer menu on the Request Items screen. The menu functions include the following:

- **Info**: Accesses the Info popup. Users can enter values for the CFAs that are set up for RTV Requests, view Authorization Code, Supplier and so on.
- **Notes**: Accesses the notes dialog to capture notes.
- **Save** : Saves the request in ‘Request in Progress’ status to be completed later.

  Saving an RTV does not publish any message nor does it reserve any inventory; it simply saves it.
- **Reject**: This option allows you to reject the request and move it to ‘Rejected’ status.

  Shipment: This menu option will allow you to ship the items in the approved request or view the shipment and container details if they exist. Security exists to create, view and edit the shipment
  - The shipment will be created with or without a container.
  - If the user has permission, Allow Modify Default Container Method, they will be able to select/modify the container method. The container method is defaulted per the ‘Create Vendor Shipment with Container by Default’ store configuration.
  - The user navigates to the RTV Shipment.
- **Close RTV**: This menu option will allow you to close the RTV request. After closing an 'Approved' RTV, for the items on return, the reservation is removed and will be moved to available or unavailable, depending on where it was reserved from. A message is published to the merchandising system on the inventory reversal.
- **Back**: This menu option will allow you to leave the screen. This is available when the screen is in view only mode.

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- **Cancel**: Exits the screen; changes made in that session are not saved.
- **Print**: This option allows you to select formats and print various reports and container labels. The RTV report will be available on this screen. This option will always be available regardless of the return status.

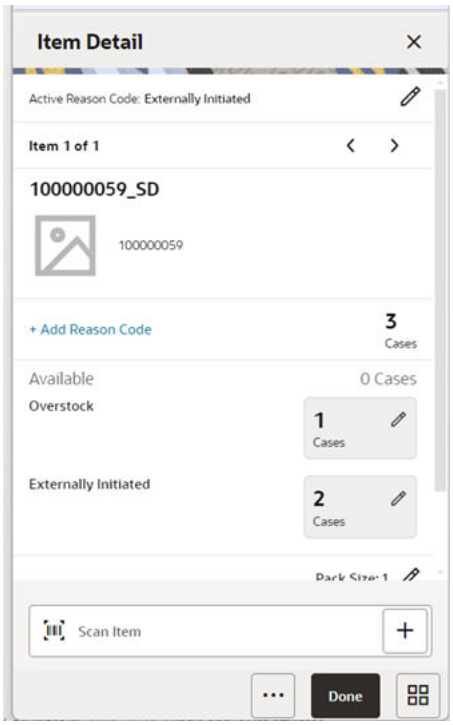
Footer Button

- **Accept**: Accepts and approves the quantities to be returned. The request moves to 'Approved' status and the system updates the reserved inventory for the items to be returned.

RTV Item Detail

Item Detail (Store Created RTV)

Figure 8-31 Item Detail Screen



The **Item Detail** screen is used when selecting or scanning an item of an internally created RTV from the **RTV Items** screen. Scanning or entering an item on this screen in the scan bar updates the return quantity per the scan mode and refreshes the Item Detail screen for the item and quantity scanned.

If the user scans a VPN, a validation is done to ensure that the VPN scanned belongs to the supplier associated to the delivery.

The return quantity can be edited and updated manually if permissions allow. Items with the **Non-Inventory** indicator set as **Yes** are also allowed to be in the transaction and you can enter approved quantity for these items.

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Whether the screen is editable or not depends on your security permission, the Status of the request and the Not After Date. The user must also have return reason code data permissions for all items on the request.

You can add multiple items (belonging to the same supplier) to be returned depending on the permissions set for them. The user can return items from both the Available bucket and the Unavailable bucket in the same screen by selecting relevant reason codes. The reason codes determine which bucket the item will be returned from. The user can select the Edit Displayed Reason Codes, which will direct to a screen to edit the reason codes.

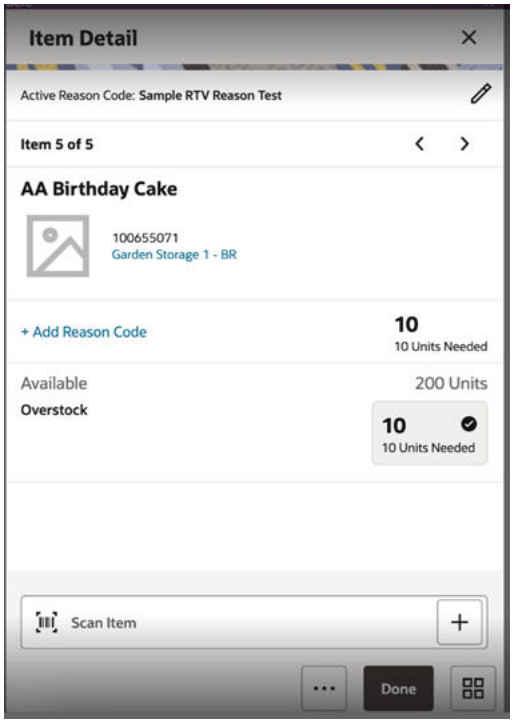
The item information, including the image (which is system configured) and item location, if sequenced, are displayed in the header. You can also view the stock on hand associated to the bucket from which the stock is coming in Shipping and Shipped quantity. The screen also displays the details of the last scanned barcode at the top of the screen.

The Footer menu, ellipsis button has options to delete an item.

The user can page through existing items on the RTV using the arrows below the header.

Item Detail (External Request)

Figure 8-32 Item Detail Screen



The **Item Detail** screen is used when selecting or scanning an item from the **RTV Items** screen in status ‘Requested’, ‘Request In Progress’ or an approved request. Scanning or entering an item on this screen in the scan bar updates the approved quantity per the scan mode and refreshes the Item Detail screen for the item and quantity scanned. If the user doesn’t have ‘Allow Over Accepting’ security permission, approved Quantity cannot be greater than the requested Quantity.

If the user scans a VPN, a validation is done to ensure that the VPN scanned belongs to the supplier associated to the delivery.

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The approved quantity can be edited and updated manually if permissions allow. Items with **Non-Inventory** indicator as **Yes** are also allowed to be in the transaction and you can enter approved quantity for these items.

Whether the screen is editable or not depends on your security permissions for Status of the request and Not After Date. The user must also have Return Reason Code data permissions for all items on the request.

You can add items that are not part of the request (belonging to the same supplier in the request), to be returned depending on the permissions set for them.

Since the request is created by an external system, most items will have a reason code (and correlated disposition) set.

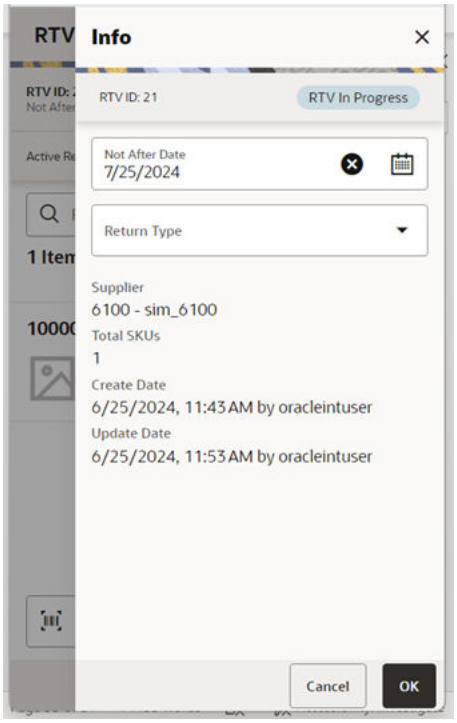
You can also add multiple items (belonging to the same supplier) to be returned depending on the permissions set for the user. The user can return items from both Available bucket and Unavailable bucket in the same screen by selecting relevant reason codes. The reason codes determine which bucket the item will be returned from. An option is provided in the screen to change the reason code as well for newly added items.

The Footer menu, ellipsis button has options to delete an item.

The user can page through existing items on the RTV using the arrows below the header.

Info (RTV)

Figure 8-33 RTV Info Screen



The Info screen is an informational popup that contains certain editable information and view only information about the RTV.

Editable information includes CFAs, Not After Date(if internally created RTV), Return Type(if internally created RTV) and so on.. The screen displays the list of CFAs (flexible attributes) that

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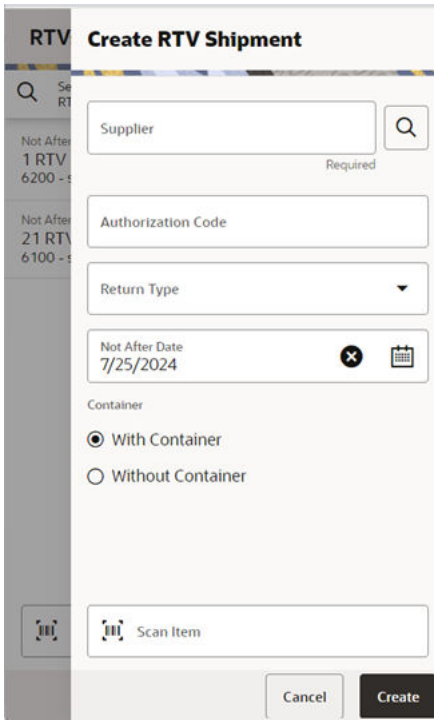
have been set up for RTV in the desktop application and lets you enter values for them. The CFAs that are set up as **Required** must have a value entered before accepting the request. The value can be one of the following: Date, Text, Decimal or Long depending on the 'data type' set up for the CFAs while creating them in the desktop application. An appropriate security permission is needed and the RTV must be in editable status for entering CFA values.

The read-only information about the header level of the rtv include:

- RTV ID
- RTV External ID (ID generated by the external system that has created the request), if available
- Status
- Not After Date
- Authorization Code
- Total SKUs
- Created Date and Create User
- Update Date and Update User
- Approval Date and Approval User
- Rejected Date and Rejected User
- Close Date and Close User

Create Shipment

Figure 8-34 Create Shipment Screen



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This screen enables you to create a new RTV shipment in order to send back items to a vendor while first creating an RTV.

Access the RTV Create Shipment popup by tapping on the 'Create Shipment' button on the RTVs screen.

Select the supplier through the Supplier Lookup option, or type in the Supplier ID, if known.

- The Supplier must be configured for Returns Allowed
- If the store parameter, ‘DSD Supplier for RTV’ is set to ‘Yes,’ then the DSD Indicator on the supplier must be ‘Yes.’
- The Supplier must be in Active status
- Multiple sets of books are enforced, meaning the org unit for the supplier must be the same as that of the store.

The Not After Date is defaulted from a parameter.

The Authorization Code can be entered while creating the shipment. If not, it can be entered later while dispatching the shipment.

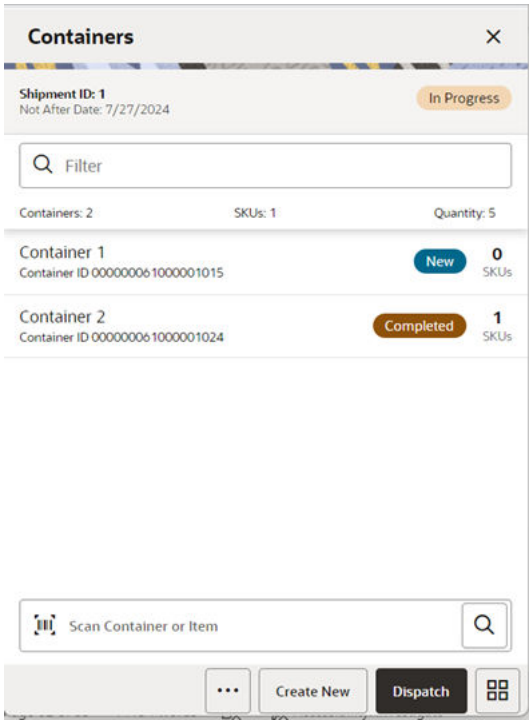
Select a Return Type, the reason for the return. This can be configured on the desktop according to the business needs; for example, Damaged Goods, Invalid Delivery, Seasonal.

The shipment can be created with or without containers depending on the retailer’s business process. It will be defaulted by store configuration, ‘Create Vendor Shipment with Container by Default’. The user can change this option if they have the ‘Allow Modify Default Container Method’ permission.

When done, select Create to create the RTV shipment for the supplier.

Containers

Figure 8-35 Containers Screen



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This screen is only accessible if an RTV shipment is created with containers.

The Containers screen displays the list of containers for a shipment or displays an empty list of containers if the shipment is new. The screen is accessed by opening a shipment from the RTVs screen or by creating a new shipment. This is the first screen displayed in a shipment flow. The screen can also be accessed by opening a shipment with containers from the Recently Edited list or from Open Transactions.

The details of a container such as ID (internal ID), Status, Tracking ID, Container ID, Total SKUs, Total Containers and the Total Quantity are available in this screen.

You can identify a container by entering or scanning Internal Container ID, SSCC ID, Tracking ID or a GS1 data bar. If the system finds the container, you will be navigated to the Container Items screen, where the list of items inside the container is shown.

The filter present in this screen can be used to narrow down the list of containers. Filtering can occur by Container ID (Internal ID, SSCC ID), Tracking ID and Status.

The ellipsis in the footer accesses the Footer menu, which contains all of the functions that can be performed on a shipment.

Submit

The shipment can be saved to 'In Progress' status to continue edits later, or it may be set to Submitted or Dispatched. Submitting is possible when the store setting Dispatch Validate is configured for 'Ship Submit'.

Submitting sets the shipment to a Submitted status and does not allow for edits; there are no updates to inventory at this point. You can only Cancel Submit or Dispatch.

If the system is enabled to obtain Fiscal Doc ID/E-way bill ID for the shipment, the process for requesting the fiscal document starts once the shipment is submitted.

Dispatch

When the shipment is dispatched, the RTV reserved quantity for the source location will decrease, in addition to the stock on hand. If no shipping quantities are identified, the transaction should be cancelled.

If the system is enabled to obtain Fiscal Doc ID/E-way bill ID as part of the shipping process, the shipment cannot be dispatched until the Fiscal Doc ID/E-way bill ID is available. The exception is when the user has ‘Allow dispatch without Fiscal Document ID’ security permission.

Footer Menu

The menu functions include the following:

- **Info**: Accesses the Info popup where details can be added/updated/viewed.
- **Notes**: Accesses the notes dialog to capture notes.
- **Cancel Submit**: Reverses the Submit and moves the shipment back to 'In Progress'
- **Delete**: Marks the shipment to 'Canceled' status. Must be ‘New’ or ‘In Progress’ status to delete. This will also cancel the approved RTV or approved RTV request.
- Back: Exits the shipment.
- **External Printing**: Displays the External Printing popup to select a printer for the pre-shipment notice and manifest documents.

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- **Print**: This option allows you to select formats and print various reports and container labels. The RTV Shipment report and the BOL Detail report will be available on this screen. This option will always be available regardless of the shipment or container status.
- **Save and Exit**: Saves the RTV shipment.

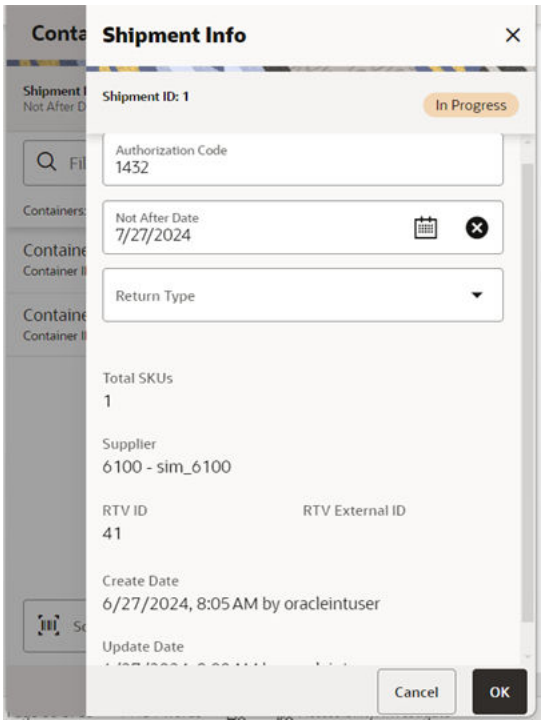
Footer Button

- **Create**: Creates a new container in the shipment.
- **Submit**: Performs validation for 'In Progress' shipments and locks the shipment for additional edits. After validation, the shipment is ready for dispatch. This menu option is only available when the store parameter 'RTV Shipment Dispatch Validate' is set to Ship Submit. Validations to check the mandatory CFAs and Fiscal Document-related fields occur during the Submit process. The process to start obtaining the Fiscal Document ID also happens at this point, if configured.
- **Dispatch**: Performs validation and dispatches the shipment. No further changes are allowed. The shipment is now ready to be physically shipped out of the store. Validations to check whether the mandatory CFAs have been captured, Fiscal Document IDs and so on, occur during the Dispatch process.

Either Submit or Dispatch is displayed, depending on the stage of the process.

Shipment Info

Figure 8-36 Shipment Info Screen



The Shipment Info screen is accessed by clicking the Shipment Info menu option in the Container screen footer menu. This screen lists ‘View Only’ details about the return shipment such as:

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- Shipment ID
- Status
- Authorization Code
- Return Type
- Supplier
- RTV ID
- Total SKUs
- Create Date/User
- Update Date/User
- Submit Date/User
- Dispatch Date/User
- Fiscal Request ID, Fiscal Request Status, Reject Reason, Fiscal Doc ID and Fiscal Doc Link, if the retailer has been using Fiscal Document ID/E-way bill ID in the shipment process.

The screen displays the list of CFAs (flexible attributes) that have been set up for RTV shipment in the desktop application, and lets you enter values for them. The CFAs that are set up as 'Required' must have a value entered before dispatching the shipment. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, when created in the desktop application. Appropriate security permission is needed and the shipment must be in editable status for entering CFA values.

The user can specify Fiscal Document related details such as Vehicle Country, Number, Drive Name and License Number if the retailer is using E-way bill process.

Bill of Lading

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Figure 8-37 Bill of Lading Screen

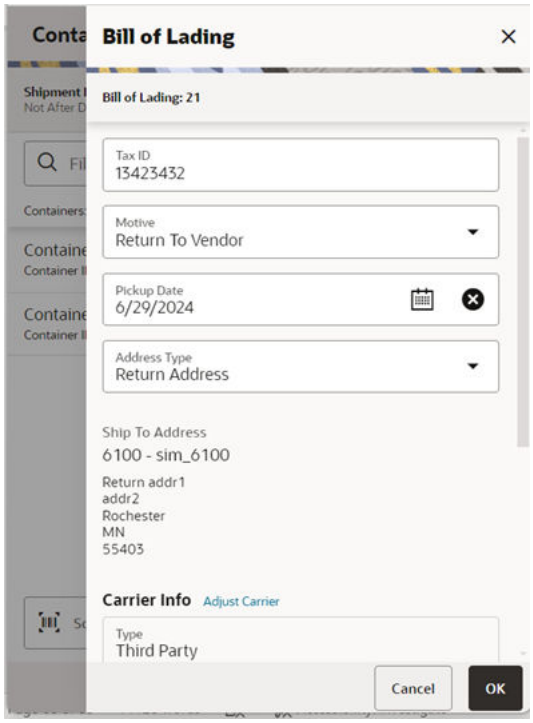
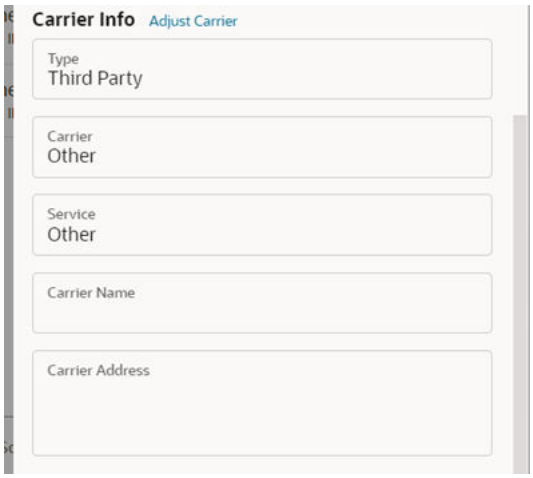


Figure 8-38 Bill of Lading — Carrier Info



The **Bill of Lading** screen is used to enter details for the shipment, including transportation details. It is editable when the user has the' Edit Shipment BOL' permission.

Details include: Motive, Pickup Date, Ship to Address, Carrier Type, Carrier, Carrier Service and Carrier Address.

The **Carrier Type** is defaulted based on the transfer carrier table, however, you can modify this if necessary. For carrier types of **Third Party**, the Service must be selected.

The list of carriers displayed in the Carrier dropdown is controlled by the data permission ‚Shipment Carrier'. Only the carriers the user has permission to will be listed in the dropdown.

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The list of carrier services displayed in the Service dropdown is controlled by the data permission ‚Shipment Carrier Services'. Only the services the user has permission to will be listed in the dropdown.

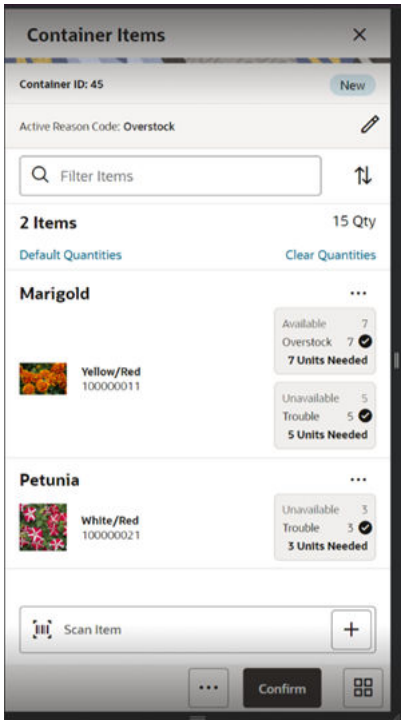
> **Note**
>
> In case the user does not have a permission for a carrier/service, the data will be view only and cannot be changed by the user.

Carriers and services can be overriden by the Manifesting system.

The Carrier information is locked down once the container has been confirmed. At that time, the Adjust Carrier button will be available to move the containers back to 'In Progress,' which allows you to make changes to the carrier and other shipment details. Using this option will also move all containers back to 'In Progress.'

Container Items

Figure 8-39 Container Items Screen



The **Container Items** screen can be reached by tapping on a container from the **Containers** screen, or by opening a shipment with containers from the**Open transactions/Recently Edited/Notifications** screen. Functions that can be performed through this screen include:

- Add items to a container with reason codes for each item. If the user scans a VPN, a validation is done to ensure that the VPN scanned belongs to the supplier associated to the delivery.

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- The user can view the ship quantity entered for an item. The screen gives you an ability to view all the reason codes added (both available and unavailable) with the corresponding ship quantity, all in one place.
- The user can navigate to the Item Detail screen for the item scanned. If the item scanned is a UIN item, the user can navigate to the UIN tab within the Item Detail screen.
- Items and quantities can be defaulted from an approved RTV document if the shipment has been created for a document/request.
- Items with the Non-Inventory Indicator set to Yes are also allowed to be in the transaction. You can enter ship quantity for these items.
- Items can be added to the container manually that are not on the original RTV document (Add Unexpected Items to RTV Shipment permission). UOM is selected at the Mode bar of the screen and applies to all the items on the container. Toggling the UOM at the Mode bar will change the UOM and convert the quantity at the line item level.
- You can add notes to the container.
- You can save, confirm, and delete a container from this screen.
- Hierarchy limitation for the container can be defined from this screen.
- The UIN icon is displayed if the item is a UIN required item with a Serial number or AGSN type.
- Unlike the reason code on the RTV, the reason code for items on the RTV shipment impact sub buckets if sub buckets are used.

Footer Menu

The menu functions include the following:

- **Info**: Accesses the Info popup. Allows you to enter Container ID, Weight, Package Size, Tracking ID and so on. Lets you enter values for the CFAs that are set up for RTV Shipment Containers.
- **Notes**: Accesses the notes dialog to capture notes.
- **Default Item**: Allows you to pull approved items from approved RTV documents to the shipment. This option is only available for shipments created for a return request. User must have ‘Default Items to RTV Shipment’ permission.
- **Adjust**: Allows you to move the container back to an editable state after it has been confirmed. The user needs the necessary permission to adjust a container.
- **Save**: This menu option is available on the menu when the screen is in edit mode.
- **Cancel**: Exits the screen without saving the changes made, if any. This option is available when the screen is in edit mode.
- **Back**: This allows you to exit the screen. This menu option will be available on the menu when the screen is view only.
- **Delete**: This option allows you to cancel the container. Reserved inventory is removed appropriately and any associated RTV documents set back the remaining quantities. Appropriate security permission is necessary to delete a container.

  If the container contains UIN items, the UIN state should be set back to their previous state.
- **Print**: This option allows you to select formats and print various reports and container labels. The RTV Shipment Container report will be available on this screen. This option will always be available regardless of the shipment or container status.

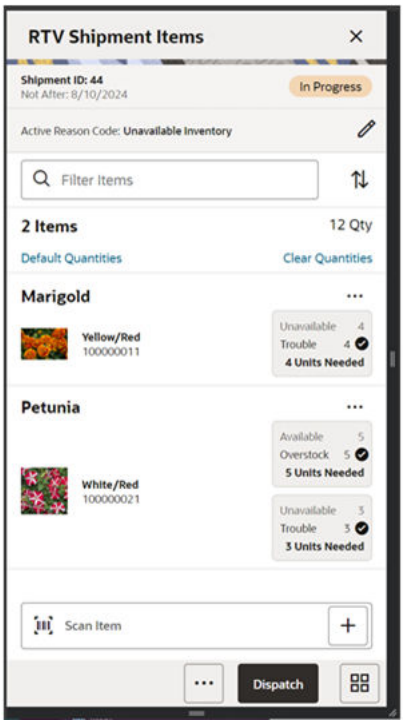
Footer Button

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- **Confirm**: Allows you to complete the container with no further edits. Appropriate security permission is necessary to confirm a container. The status of the container moves to 'Completed' status.

RTV Shipment Items (without Container)

Figure 8-40 RTV Shipment Items Screen



The RTV Shipment Items screen is used to add items within a shipment without containers.

There are several functions you can perform on this screen. Some of the features include:

- Add items from RTV documents or add loose items
- Submit/Dispatch the shipment

The shipment can be created with or without referencing an RTV document.

When a shipment is created but not yet completed, the shipment will display a status of 'In Progress'. The RTV reserved bucket will update the moment the shipment is saved for on the fly shipments. If the item is from a request/document, reservation must have happened at the time of approval of the request/document. Any new additions or deletions of items and quantities would be updated to the approved document. It will also update the In Shipping quantity in the document. When the shipment is dispatched, the saved quantity in the transfer reserved bucket will be removed. This keeps the inventory accurate.

The item image for the line items is displayed per configuration. Line items appear in a list and selecting a line item will navigate to the item details of the item. Scrolling in the list of items on the left will display a filter. The filter can be used to narrow down the list of items. Filtering can occur by Item ID, Description, and Reason Code.

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- Add items to a container with reason codes for each item. If the user scans a VPN, a validation is done to ensure that the VPN scanned belongs to the supplier associated to the delivery.
- The user can view the ship quantity entered for an item. The screen lets you view all the reason codes added (both available and unavailable) with the corresponding ship quantity.
- The user can navigate to the Item Detail screen for the item scanned. If the item scanned is a UIN item, the user can navigate to the UIN tab within the Item Detail screen.
- Items and quantities can be defaulted from an approved RTV document if the shipment has been created for a document/request.
- Items with a Non-Inventory Indicator set to Yes are also allowed to be in the transaction, and you can enter shipment quantity for these items.
- Items can be added to the container manually that are not on the original RTV document (Add Unexpected Items to RTV Shipment permission). UOM is selected at the Mode bar of the screen and applies to all the items on the container. Toggling the UOM at the Mode bar will change the UOM and convert the quantity at the line item level
- Unlike the reason code on the RTV, the reason code for items on the RTV shipment will impact sub buckets if sub buckets are used.

Next to each item, the UIN icon will display if the UINs have been associated to the item.

The ellipsis in the lower right hand corner will access the footer menu, which will contain all the functions that can be performed on a container.

Footer Menu

Info: Info will access the Info screen.

Shipment Info: Accesses the Shipment Info screen.

Notes: Accesses the notes common dialog to capture notes.

Save and Exit: Saves the shipment in ‘In Progress’ status to be completed later and exit the screen. This option is only available when the screen is in edit mode.

Bill of Lading - This menu option will allow the user to view/enter the shipment information for the carrier and other details.

Close - This menu option will allow the user to close a shipment if the Not After Date has passed.

Cancel Submit - This menu option will move the shipment back to a state that allows edits

External Printing - This menu option will allow the user to set the printer to use for the user session when automatically generating specific manifesting documents.

Print: Opens the print dialog and allows you to select formats and print various reports and container labels. The Transfer Shipment and BOL report will be available on this screen

Delete: Marks the shipment to 'Canceled' status. This option will only be available for shipments that are in a New or In Progress status.

Cancel: Exits the shipment and changes made in that session will not be saved. This screen is only available when the screen is in edit mode.

Back: Returns to the previous screen. This option is only available when the shipment is view only.

Footer Buttons

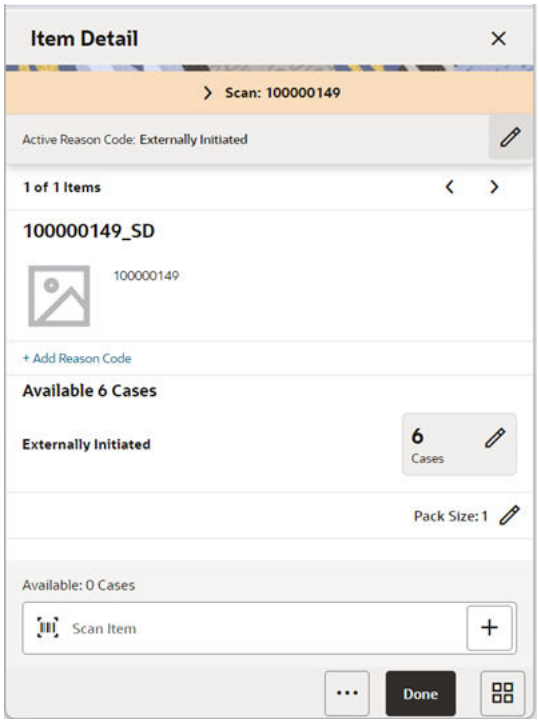
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Submit: Submit will perform validations for 'In Progress' shipments including excluded store validation and lock the shipment for additional edits. The shipment will be ready for dispatch. This menu option will only be available when the store parameter RTV Shipment Dispatch Validate' is set equal to Ship Submit. Validations to check if the destination is a closed store for the sending store, mandatory check on CFAs, Context Type etc., will happen here. The process to start obtaining Fiscal Document ID also happens at this point, if configured.

Dispatch: Dispatch will perform validations including excluded store validation and post transactions to finalize the shipment and no further changes are allowed. Validations to check if the destination is a closed store for the sending store, mandatory check on CFAs, Context Type, Fiscal Document ID etc., will happen here

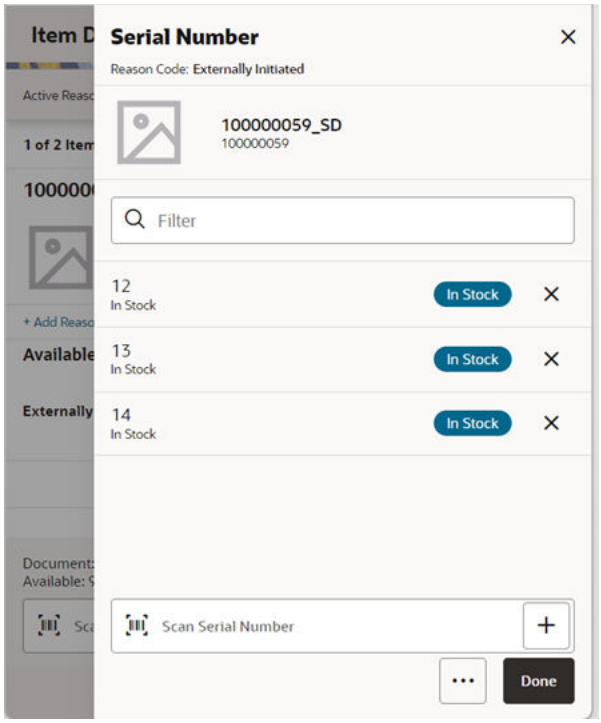
Item Detail

Figure 8-41 Item Detail Screen



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Figure 8-42 Serial Number Screen



The **Item Detail** screen is used when selecting or scanning an item from the **Container Items or RTV Shipment Items** screen. Scanning or entering an item on this screen in the scan bar updates the quantity per the scan mode and refreshes the item detail screen for the item and quantity scanned. The quantity can be edited and updated manually if permissions allow. A user can over ship and ship more than was on the RTV document/request if the user has the 'RTV Shipment Allow Over shipping' permission.

If the user scans a VPN, a validation is done to ensure that the VPN scanned belongs to the supplier associated to the delivery. The user can navigate to the Item Detail screen for the item scanned. If the item scanned is a UIN item, the user can navigate to the UIN tab of the Item Detail screen.

If the same item must be shipped from both available and unavailable buckets using multiple reason codes/sub-buckets, you can do it all from the same Item Detail screen.

Items with the **Non-Inventory** indicator set to**Yes** are also allowed to be in the transaction, and you can enter ship quantity for these items.

The item information includes the image that is system configured to display in the header. The screen contains information fields showing:

- Inventory Quantity
- Remaining Quantity
- Ship Quantity
- Reason Code
- Sub-Bucket (if sub-buckets are enabled, for unavailable inventory only) associated to the bucket from which the stock is coming.
- Displays the details of the last scanned barcode at the top of the screen.

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Pack size can be edited from this screen.

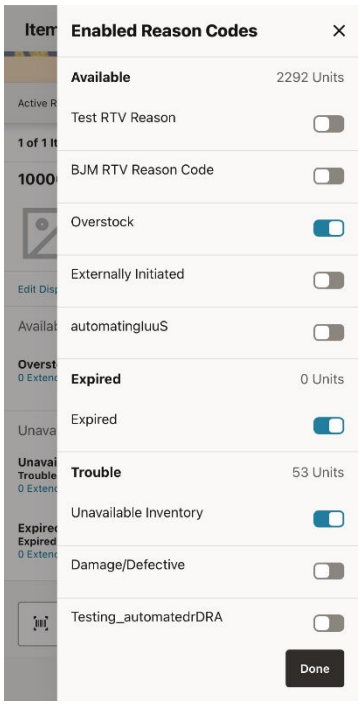
The footer menu (ellipsis button), contains options to edit the pack size, View Locations and Delete. Page through existing items in the container view using the arrows at the top.

To add UIN details to UIN items, you can access the UIN screen by selecting the ship quantity field for the item from the Item Detail screen. This navigates to the UIN screen, where you can add and remove UINS for UIN items.

There is also an **Extended Attributes** link that enables the user to view/capture Extended Attributes for the item. If the item is not configured to capture extended attributes or there are no extended attributes captured, the list will be empty.

Reason Codes

Figure 8-43 Enabled Reason Codes



The Reason Codes screen appears when a user clicks the Edit Displayed Reason Codes from the Item Detail screen. It shows the reason codes that are on the shipment and allows a user to add and remove reason codes.

Info (Container)

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Figure 8-44 Info (Container) Screen

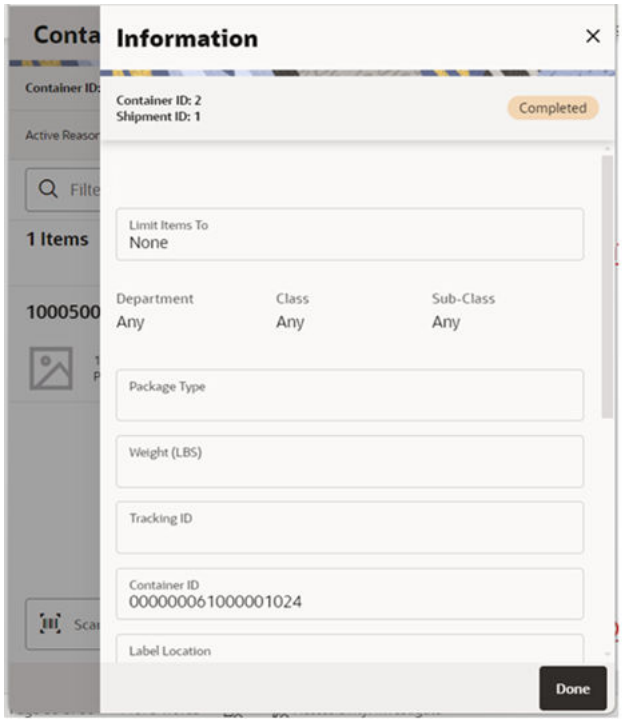
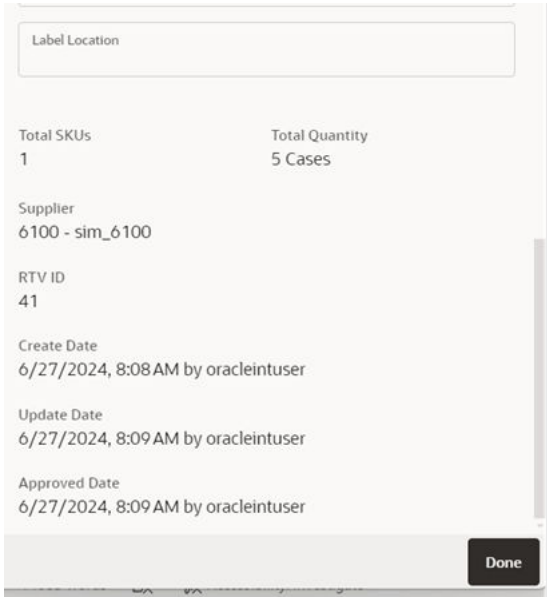


Figure 8-45 Info (Container) Screen 2



The Info screen appears when a user clicks the Info menu option on the Footer menu of Container Items/RTV Shipment Items screen. The Info (Container) screen is an informational screen containing certain read-only information about the header level of the container. It also enables the user to specify certain details, such as CFAs.

Details Include:

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- Container ID
- Shipment ID
- RTV ID
- RTV External ID
- Status
- Supplier
- Container ID – entry field for the number of the barcode on the container. If ‘SSCC Shipping Label ID Generation’ is set to ‘Manual’, the user must type in a value. If it is set to ‘Auto’, the Container ID will be defaulted per the system generated ID, and the user can change it.
- Create Date/User
- Updated Date/User
- Approve Date/User
- Total SKUs
- Total Quantity – sum of the shipped quantity for this container.

The screen lets you enter CFAs, Package Type, Weight, Tracking ID, and container restriction by hierarchy. The inventory status and the container restriction by hierarchy are locked down once the first item has been added to the container.

Limit Items to (Hierarchy Restriction)

- If you want to set up the container to restrict it holding the same type of items, you can restrict by department, class, and subclass. You do not select the actual department, but rather set the hierarchy level you want to restrict by. When the first item is added to the container, the department, class, and/or subclass is set for the container based on the hierarchy the item is part of. The container detail screen will display the hierarchy that is locked in. Any items added subsequently must match the hierarchy of the first item. For example, if the restriction was set up to limit items to the same department and the first item added was for the Women's Department, only items that match the Women's Department can be added to the container, but it will not matter which class and subclass the item is in since the hierarchy level is set at Department.
- The hierarchy level is auto defaulted depending on the user’s permissions.

If manifesting has been configured, the package type and weight may be required by the carrier selected for the shipment before you can confirm the container.

Processing

When a return document is saved or updated from the RTV shipment, the system moves the items from either Available or Unavailable (non-sellable) inventory, based on the inventory status, and moves it to the Reserved bucket within unavailable inventory. The Return to Vendors uses the RTV Reserved bucket. Upon dispatching the return, the Reserved buckets will be removed and the stock on hand will be decremented. If sub-buckets are turned on, the appropriate sub-bucket associated with the return reason will be updated when returned from unavailable inventory.

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> **Note**
>
> It is only possible to ship one time against an RTV Document, so the RTV document will be completed even if not everything is shipped. Closing the RTV will remove all RTV reserved quantities, regardless of whether or not they were all shipped.

Example 1: Return to Vendor using Available Inventory

Item Lookup before:

Store A

- Total SOH = 706
- Available SOH = 706
- Total Unavailable SOH = 0
- RTV Reserved = 0

1. The user creates an RTV to move inventory from Store A to the Vendor using available inventory.
2. The user enters a return quantity of 6 and clicks Approve.
3. A quantity of 6 is placed into the reserved bucket in both the Store Inventory system and Merchandising. Merchandising is updated through sending a mod message.
4. The retail ordering system takes into account the saved (reserved) quantity when replenishing the item through its regular ordering (auto-replenishment) process.
5. Total SOH - Non sellable (Adjustment Unavailable Qty) - Transfer reserved quantity - RTV reserved quantity - Customer Reserved Qty = Available Quantity

   Store A:

   - Total SOH = 706
   - Available SOH = 700
   - Total Unavailable SOH = 6
   - RTV Reserved = 6

   > **Note**
   >
   > Unavailable is a total of all sub-buckets.

6. Modify Return Qty to 8 and click Dispatch.

   Item Lookup:

   - Total SOH = 698
   - Available = 698
   - Unavailable = 0
   - Reserved Qty = 0

Example 2: Return to Vendor Using Unavailable Inventory

Item Lookup before:

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Item Lookup	Database
Total SOH = 800 Available = 700 Unavailable = 100 Nonsellable = 100; Sub-bucket: Trouble 75, Admin 25 RTV Qty = 0	RTV_Quantity = 0 Nonsellable (Adjust Unavail) = 100

1. The user creates a shipment and enters a return quantity of 10 (unavailable) and clicks Save.

Item Lookup	Database
Total SOH = 800 Available = 700 Unavailable = 100 Nonsellable = 90; Sub-bucket: Trouble 65, Admin 25 RTV Qty = 10	RTV_Quantity = 10 Nonsellable (Adjust Unavail) = 90

> **Note**
>
> The available quantity will still display as 700 on the UI and reports.

2. Modify Return Qty to 12 and click Dispatch.

   Item Lookup:

   - Total SOH = 788
   - Available = 700
   - Unavailable = 88
   - Nonsellable = 88; Sub-bucket: Trouble 63, Admin 25
   - RTV Qty = 0

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9

Shipping and Receiving Common Components

Overview

The shipping and receiving functions in the mobile application have several common components. The following functional areas are included: Customer Order Deliveries, Return to Vendor Shipments, and Transfer Shipping/Receiving for store, warehouse, and external finisher. They include tasks usually performed by shipping or receiving associates. This also includes integrating to a third-party manifesting system for rate shopping to find the least expensive delivery method.

The feature of shipping and receiving available in mobile is:

- Manifest web services for rate shopping

Manifesting

Manifesting systems help retailers create manifest documents, Bill of Lading (BOL), shipping container labels for shipments, and reduce cost through rate shopping by finding the least expensive delivery method for the given shipping criteria.

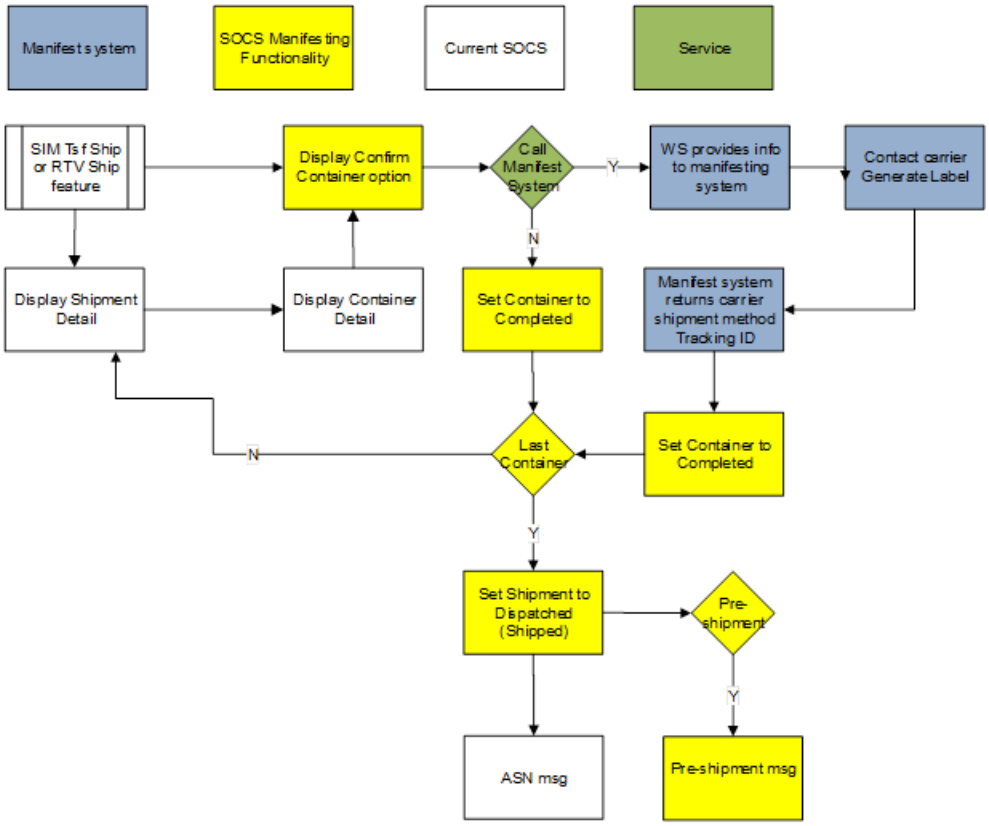
For larger shipments, multiple containers may exist and each container requires a separate tracking ID. For RTV Shipment and Transfer Shipment, the manifesting service will be called when confirming each container. The carrier and service are required to be the same for all containers within the same shipment. The container and shipment are all inclusive for Customer Order Deliveries.

Business Case

A user creates a shipment (store, warehouse, finisher, customer order delivery, or return to vendor) and enters in the package type of "Small" and Weight of 2.3 lbs. The Manifesting system will do the rate shopping for the carrier and service and automatically print out a label for the package.

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Figure 9-1 Integration - Flow-Ship Container



The above flow shows the confirmation of a container and how a call is made to the manifest system. The flow is highlighted in different colors to help identify different integration points.

When you confirm each container for an RTV or Transfer shipment, the system can invoke the web service to provide the required shipment details to the manifesting system and subsequently return a tracking ID for each container.

After all containers have received their tracking ID, you can ship the shipment, or an external system indicates to the Store Inventory system that the shipment is dispatched.

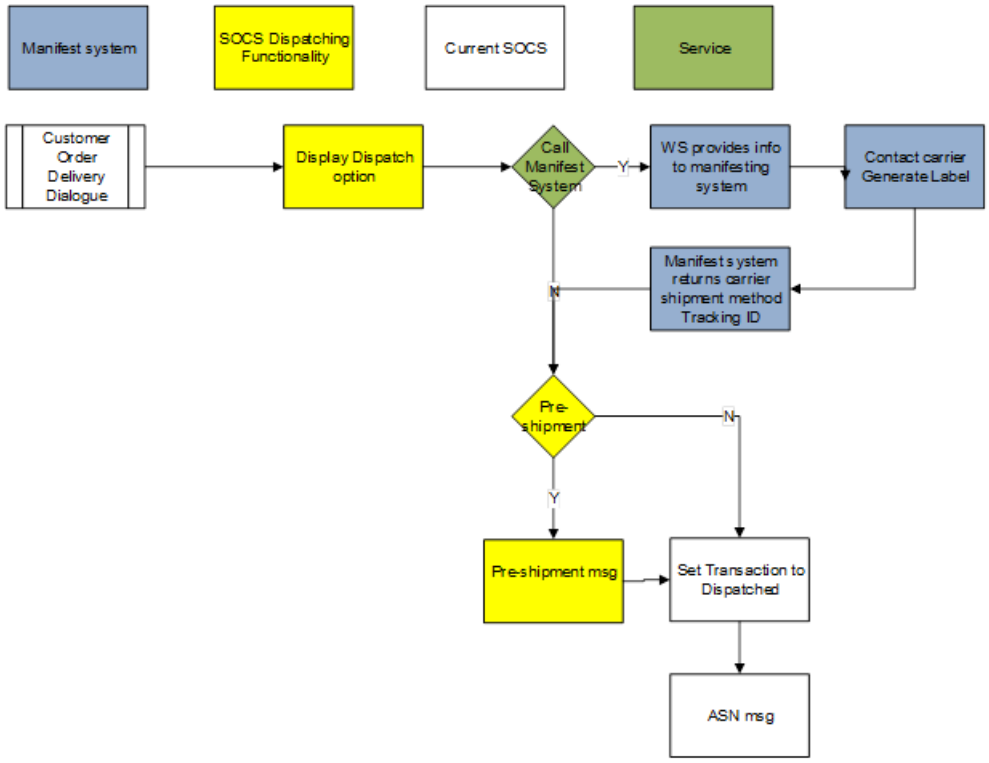
> **Note**
>
> Customer Order Deliveries only use the web service at submit or dispatch since the shipment will always be a single container.

If the Store Inventory system is configured to publish a pre-shipment, it sends the pre-shipment notice to the pre-shipment system.

If the carrier must be changed for the shipment with transfer shipment or RTV shipment, you adjust the carrier, which will cause all containers to move back to 'In Progress'. Once the shipment has been dispatched, you will no longer be able to adjust the carrier.

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Figure 9-2 Customer Order Delivery Flow



The above flow represents when a Customer Order Delivery is dispatched and a call is made to the manifest system. The flow is highlighted in different colors to help identify different integration points.

Mobile

Features:

- Enter Carrier BOL Information
- Enter Container ID, Weight, Package Type, and Tracking ID
- View Carrier BOL Information
- Set External Printer
- Print Reports

You have the ability to enter the carrier details for Transfer Shipments, RTV Shipments and Customer Order Deliveries. You can access the **Edit Shipment** screen by navigating to the Shipment and selecting **Edit Shipment** from the Footer menu.

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Edit Shipment

Figure 9-3 Edit Shipment Screen



For Transfer Shipments, if the shipment is for sending items to a warehouse or finisher, you have the option to enter an Authorization Number. This is not applicable to Transfer to Store or Customer Order Deliveries. Security permissions exist to enter an Authorization Number.

In order to prepare the shipment for manifesting, you are required to enter the carrier information on this screen. When the carrier Type is Third Party and the Carrier Service is a (P) parcel service, the manifesting service is called when you confirm the container. Security permissions exist for you to edit the Carrier BOL information.

Motive

The motive for the shipment is based on the functional area and sequence number. The code with the sequence of 1 will be displayed by default. You can create and manage Motives through the desktop application.

Carrier and Service Selection

The carrier type is defaulted based on the store parameter 'Carrier Default' set up for each type of transaction (store, finisher, warehouse, and RTV).

Delivery Type	Default Carrier
Customer Order Delivery	Third Party if the customer has identified a carrier to use on the customer order. If no carrier is identified on the customer order the Sender.
Ship To Customer	Sender

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Delivery Type	Default Carrier
Pick Up	Receiver

If the carrier type is Third Party, the Carrier is available for selection. This field may be overwritten by the manifesting system when used. You may select **Other** from the list of carriers. If **Other** carrier is selected, the Carrier Name and Address will be enabled.

When a carrier is selected, a list of services available for the carrier will be selectable. This field may be overwritten by the manifesting system when used in addition to the Carrier. The manifesting service call made can include checking for the best rate and will override what was selected by you.

Shipment Carriers, Shipment Carrier Services, Shipment Weight UOM, and Shipment Package Sizes are setup and maintained in the desktop application.

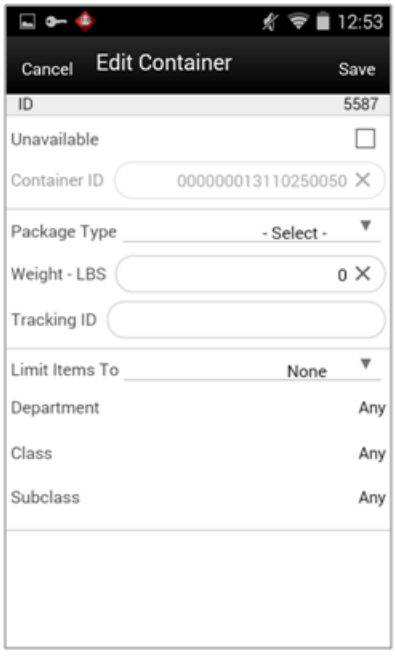
Each Carrier will have one of three manifest types: (P) Parcel, (H) Home Fleet, and (O) Other. Only carriers with a manifest type of (P) Parcel will be used with the manifesting integration service. Depending on the carrier service, weight and package size may be required. The system will alert you when the information is missing.

Adjust Carrier (Transfer Shipment and RTV Shipment Only)

The BOL Details for a shipment gets frozen once the first container is confirmed and cannot be changed without moving all the containers for the shipment back to an 'In Progress' state. This is done by using the **Adjust Carrier** feature. The BOL Details can be adjusted until the shipment is dispatched if you have the appropriate permissions. Once you select **Adjust Carrier**, a new carrier may be selected and each container will need to be reconfirmed to manifest again.

Edit Container

Figure 9-4 Edit Container Screen



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The Edit Container screen is only applicable to Transfer Shipments and RTV Shipments, since Customer Order Deliveries shipment and container is all inclusive. You will enter the package type, weight, and other container details from this screen. Security permissions exist for you to edit this screen. If manifesting is used, the manifesting service will return the tracking ID. The Edit Container screen is accessed from the Footer menu of Transfer/RTV Ship Container screen, RTV Ship Container Screen, and Transfer Receiving Container screens. Since the Edit Shipment screen defines the entire shipment, the Edit Container screen is used to identify the package type, weight, and tracking ID for each individual container.The customer order feature does not use this screen. For customer order deliveries, the package type weight and tracking ID are entered directly on the Edit Shipment screen. The Transfer Receiving feature also uses this screen to enter Reference Container ID, Damage Reason. The tracking ID may also be captured on this screen.The validations listed below apply to Transfer Shipments, RTV Shipments, and Customer Order Deliveries. The validations for Transfer Shipments and RTV Shipments are performed at the time of confirming the container, while Customer Order Deliveries performs the validations upon submit or dispatch of the shipment.

Weight and Package Validation

The weight field is used to enter in the weight of the package. The weight will be entered in the unit of measure based on the store admin Manifest weight UOM.

The package type is used to define the dimensions of package such as Large Envelope, Small Box, Medium Box, and so on. The package type will be selected from a defined list of packaged types in the Carton Dimension table.

Depending on the carrier/service selected for the shipment, the package type and weight may be required (this is only validated when the manifesting system is called). The Shipment Carrier Service table identifies when the weight and package type is required. This table is populated from a data script.

Note that when creating a transfer shipment container or RTV shipment container on the mobile, the carrier is defaulted based upon a store setting, Carrier Default. When the setting is Third Party, the carrier is Other and the service is blank. Therefore, you are not prompted for the weight and/or package type unless the carrier /service had been set as something different.

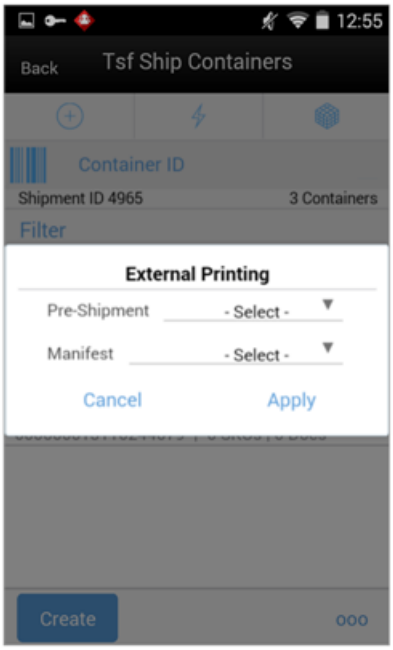
Tracking ID

The Tracking ID will contain a single ID for tracking the package; it can be entered by you, come from the manifesting system or come from the shipping ASN. It may get overwritten/ updated by an external manifesting system. The tracking ID entered within the Transfer Receiving dialog can be leveraged to find a container.

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External Printing

Figure 9-5 External Printing Screen



This screen can be accessed within the Shipments by selecting **External Printing** from the Footer menu of Transfer/RTV Ship Containers screen and Customer Order Deliveries. The user must have Access External Printing permission for the External Printing option to be available. The external printer can be defined for the pre-shipment and manifest documents. These settings will remain until you log out of the application. This setting is applicable across all functional areas within the mobile application that use the Pre-Shipment and Manifest documents. If the printer is selected for Transfer Shipment, the same printers will be set for Customer Order Deliveries dialog and RTV Shipment and vice versa.

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Print

Figure 9-6 Print



The Print dialog is accessed when selecting print within the mobile application. It is available when selecting print from the footer menu within a transaction.

The transaction format type or types that are applicable to the functional area will be available for selection. For example in Customer Order Deliveries, there may be format types of Customer Order Delivery and BOL. If there is only one applicable format type for the functional area it will be defaulted.

Once a format type is selected, the system will list all of the reports that are available to print for that format type. The report will default based upon the default format type. You can choose to select a different report format to print if other report formats exist for this format type transaction. Once print has been selected for the report, the PDF is retrieved based upon the report format.

E-way Bill (Fiscal Document)

E-way Bill (Electronic way bill) is a document that is required for transporting goods in certain countries. It is be generated through the government portal for the shipment. The E-way bill is required to ship all the goods except those exempted under the notifications or rules pertaining to the country. The retailers can configure SIOCS using store configurations to incorporate obtaining the E-way bill document in the shipment process if E-way bill is mandatory in the country where they are operating. SIOCS uses a generic term called ‘Fiscal Document’ to refer to ‘E-way bill document' and ‘Fiscal Doc ID’ to refer to ‘E-way bill ID’. The areas where E-way bill ID is used are Transfer Shipment, RTV Shipment and Customer Order Deliveries.

The basic workflow is as follows:

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- When the shipment is submitted in SIOCS, the Fiscal Document Generator(FDG) system picks up the shipment submitted and sends the shipment details along with tax-related information to a 3rd party system, which in turn sends the details to the government system.
- The government system validates the details submitted and sends the Fiscal Document ID back if the shipment has been approved. Once this ID reaches SIOCS, the shipment is ready to be dispatched.

Fiscal Document for Shipments Workflows

The following is the detailed process for obtaining Fiscal Documents for shipments (Transfer, RTV and Customer Order Deliveries) :

Capturing Vehicle/Driver Details

- The vehicle number, vehicle country of the vehicle used for the shipment, driver name and driver license number should be captured before submitting, if configured. The retailers have the flexibility to configure which one of these details need to be captured, depending on the rules and regulations applicable in the country where the store is operating in. These configurations are done at store level.
- These details are captured in the Edit Shipment screen of the respective transactions.

On Submit of the shipment

The process of requesting a Fiscal Doc ID for the shipment starts when the user submits the shipment. Once the submit is done:

- The Fiscal Doc ID request gets a unique 'Request ID'.
- Once the request is made, there should be NO change in the shipment details (items, quantities, etc.).
- The status of the shipment will be 'Submitted', the status of the Fiscal Doc request will be 'Waiting for Fiscal Doc ID'.
- The request ID and status of the request can be viewed from the Info screens of the respective transactions.
- SIOCS should not be able to move shipments from submit to dispatch unless the Fiscal Doc ID has been received.
- However, if the user has 'Allow dispatch without Fiscal Doc ID' security permission, the shipment can be shipped without the Fiscal Doc ID

Once the Fiscal Doc ID is Received

- Once the 'Fiscal Doc ID' is available for the shipment, The status of the request is updated to 'Fiscal Doc Approved' and the shipment can be dispatched.
- The Fiscal Doc ID will be associated with the shipment only if the shipment is in 'Submitted' status or in 'Dispatched' status(if the user had override permission to dispatch before the Fiscal Doc ID arrived).
- A notification will be created informing the user that the shipment is now ready for dispatch, if the shipment has not been dispatched already.
- **Fiscal Doc Link** — When the Fiscal Doc ID is communicated to SIOCS, there is a possibility that an external link(URL) will also be sent. This URL enables the retailer to print the Fiscal Document, whenever needed. Any user with ‘Access Fiscal Doc URL’ security permission can access this URL.

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Cancelling the Request

If the User does a 'Cancel Submit' of the shipment, the Fiscal Doc ID will become invalid if there is already one. In case the Fiscal Doc ID is received post 'Cancel Submit', it will be rejected/ignored. The Shipment has to go through the 'Submit' process again, obtain the new Fiscal Doc ID in order to be dispatched.

Transfer and Vendor Deliveries — The warehouse and supplier will also need to obtain Fiscal Doc ID before they dispatch the shipment. SIOCS is able to leverage the Fiscal Doc ID from the deliveries sent from a warehouse and also for the deliveries from vendors.

Scan Bar — SIOCS will allow a user to scan the Fiscal Doc ID and retrieve the transaction with it, similar to ASN, Container etc., in the Transaction List screens of Transfer Shipment, RTV Shipment, Customer Order Deliveries, and Transfer Receiving and DSD Receiving.

Configurations

The Store Inventory system provides retailers with great flexibility to handle Fiscal Doc mandate based on the rules and regulations prevailing at the location of the store. The configurations are set at store level and further at the Transaction type level.

Configurations to Enable Obtaining Fiscal Doc

Restrict Shipment Dispatch After Submit

A shipment cannot be dispatched without a Fiscal Doc ID. The system automatically requests for Fiscal Doc ID on Submit when this store parameter is set to ‘Yes’. Once the Fiscal Doc ID is available, the user is notified and the shipment can be dispatched. This parameter is available separately for each transaction type (Transfer shipment, RTV Shipment, Customer Order Delivery). This allows the user to set the Fiscal Document mandate only for the transaction for which it is necessary.

Capture Vehicle Details on Submit

The details related to the vehicle and the driver used for the transportation of the items must be sent to the government in order to obtain the Fiscal Doc ID. In SIOCS, this can be achieved by setting the store parameter ‘Capture Vehicle Details on Submit.’ This configuration can be set at Transaction Type level (Transfer Shipment, RTV Shipment, Customer Order Delivery) and the values for these fields can be captured through the respective ‘Edit transaction’ screens. The value captured for these fields are not persisted in SIOCS DB due to PII regulations.

The retailers are offered the flexibility to make all or some of these details mandatory to be captured based on the rules and regulations of the store location. The store parameters that enable the retailer to configure this for Transfer Shipment are as follows:

- Vehicle Number Required for Transfer Shipment
- Vehicle Country Required for Transfer Shipment
- Driver Name Required for Transfer Shipment
- Driver License Number Required for Transfer Shipment

Similar list of configurations are also available for RTV Shipment and Customer Order Delivery. This means that the configurations mentioned above can be set at different Transaction Type levels, which offers more flexibility.

View Fiscal Doc Information

The user can view the Fiscal Doc Request ID, Request Status, Reject Reason (if rejected), Fiscal Doc ID and Fiscal Doc Link in the Info screen of the respective transactions.

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Search Criteria Screen

Fiscal Doc related fields are also included as part of Search Criteria screens of Transfer Shipment, RTV Shipment, Customer Order Deliveries, Transfer Receiving and DSD Receiving.

To better understand how the Fiscal Doc related fields are accommodated in the screens, please refer to the respective shipping areas in this User Guide.

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10

In Store Replenishment

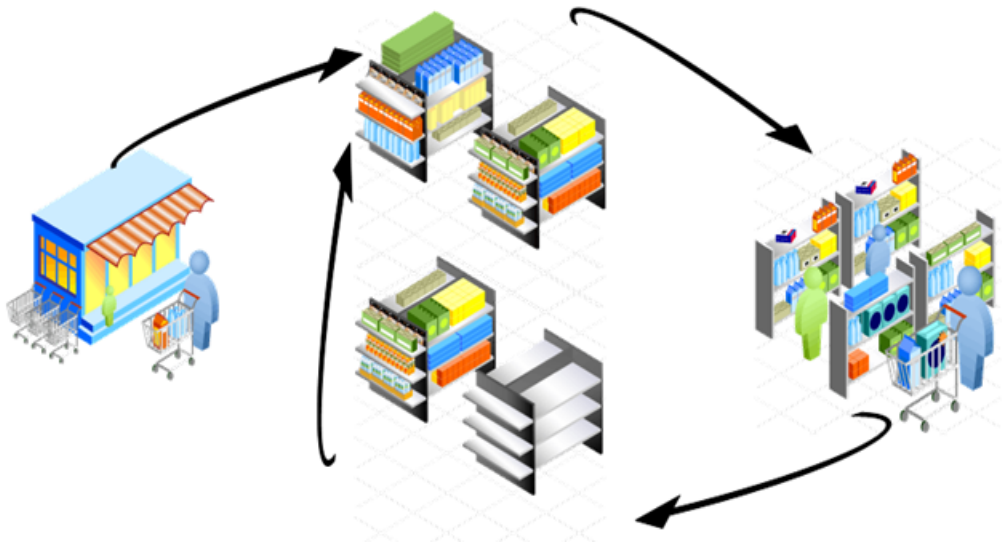
This chapter covers shelf replenishment. The following topics are covered:

- Overview
- Business Cases
- Screen Flow
- Functionality - MAF
- Functionality - Jet Mobile
- Most Common Functional Process

Overview

The replenishment process attempts to ensure that the shop floor inventory is set at a level best suited for enticing customers to buy a product and to prevent empty shelves. Shelf replenishment functionality within the mobile application is related to the movement of goods from the back room to the shop floor and shop floor to back room. For example, when a certain soda quantity is low, you can initiate a replenishment process so that more of the soda is moved from the back room. Similarly, if there is excess stock on the shop floor, the mobile application supports processes to move inventory to the back room. Some of the processes require capacity setup and some form of plan-o-gram sequenced data, while others do not.

Figure 10-1 Shelf Replenishment



Shelf replenishment-related processing within the mobile application includes the following features:

- The following lists the different replenishment methods:

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  - Capacity algorithm based on stock level percentages
  - Sales based
  - Gap empty shelf scanning
  - Display stock replenishment
  - Receiving on the shop floor
  - Automatic
  - Print Reports
  - Manage Delivery Bay
- The system can calculate the optimal quantity of inventory on what should be held on the shop floor to prevent empty shelves.
- On demand generation of pick lists with real-time data
- Store employees are driven to replenish the most urgently needed items first
- Optional item location guidance when picking items by back room micro sequence
- Formal or informal picking dialog
- Ad hoc update shop floor and back room process to balance and correct inventory positions
- Optional substitution when lacking inventory
- Within day partial or end of day full replenishment pick lists for user efficiency

Capacity replenishment uses shop floor capacity and back room inventory positions to calculate a pick list optimized to keep shelves on the shop floor well stocked. You must indicate how many cases you want to replenish and which items by selecting the product group. This method is focused on those retailers and items which have a well-defined plan-o-gram.

The capacity-based replenishment method is best used by retailers who have a structured shop floor where it is easy to define capacity, items are fairly static, and multiple units are on the shop floor. This is especially useful for grocery retailers and mass merchandise retailers. The structured shop floor is important to this method since there is an inherent cost involved with the need to understand how much capacity exists on the shop floor. A dynamic environment with continuously changing assortments or single item counts often is too costly to maintain the plan-o-gram shop floor capacity.

Capacity based requires you to define product group components using the product group dialog which will be used to generate the pick list.

Gap scanning is focused on those retail environments who want to have a very simple easy to use shop floor replenishment system. You can scan items on the shop floor which become a back room pick list for someone to pick items on and bring to the shop floor.

Sales-based shelf replenishment is based on a process that records all sales coming into the store. The sold item is added to the pick list based on merchandize hierarchy. Like the ad hoc scanning process, this does not require plan-o-gram information. Sales-based shelf replenishment is especially well suited for fashion retailers who have constantly changing assortments and have many low, or even single instance items like special shoe sizes or undergarments.

Display Stock is a replenishment method specifically geared towards single unit items that are used to sell to customers and are related to each other by style. The process allows a user to scan the items they have on the shop floor. The system will generate a pick list for those styles and differentiator combination not represented on the shop floor.

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The Display List type shelf replenishment helps you to scan a list of items available on the shelf and create a list and compare it with the product group and identify the gap and replenish. The product group dialog allows you to select the diff through which the replenishment would be done. The Display list method requires you to define outside of the product group components to also define the differentiator. The combination of differentiator and product group used with a scanned list will provide you with a list of items that were not scanned.

Business Case example: A handbag retailer displays all the colors within a style for purses. Susan finds the perfect burgundy colored purse, picks it up from the shop floor, and goes to a sales counter. The sales associates on the sales floor do not notice that particular color/model is not displayed anymore. Jane looked at a magazine and really wanted to have the featured red colored purse, but when shopping for that specific purse she does not see it on the shop floor and assumes it has sold out or was never carried. She decides to walk out of the store without a purchase and look at a different purse vendor who may have the red colored purse.

This scenario could easily have been resolved by the sales associate scanning periodically the items that are displayed on the shop floor and generating a list of missing items in inventory using the display replenishment methods.

Shop floor receiving will allow the receiving associate to indicate if they are receiving in the back room or directly on the shop floor. This method is most often used with those retailers that have daily deliveries and move delivered quantities directly to the shop floor since most of the delivered quantities are just in time deliveries as is the case in the grocery environment.

The automatic option will refresh the store shop floor quantities based on capacity and available inventory for a specific merchandise selection. This feature can be used by those retailers who have a process where the store is brought back into a refreshed state at the end of the day and do not want to run manual or calculated pick lists. Another possible scenario could be when a large refresh is required due to significant plan-o-gram changes or when initially configuring a store.

Business Cases

Three business case examples are shown below:

Replenishment of Shop Floor

This operation will help a retailer to move goods from the back room to the shop floor. This is done to achieve a better fill rate at the store; the more shelf space is utilized, the better sales. This is possible even if a retailer is not using sequencing.

Moving Items to the Backroom

Moving of Items from Shop floor to the Backroom is possible. It helps a retailer to move extra goods from the shop floor, which could be an outcome of receiving the delivery at the shop floor itself or incorrect movement of goods. For example, if a retailer receives a delivery at the shop floor but there is not enough space to keep the full delivery, then the retailer can use this functionality to move the goods to the backroom which are not required for that moment on shop floor. Secondly, if due to manual intervention there has been a movement of goods from the backroom to the shop floor and the shop floor cannot accommodate that much quantity, the retailer can push back the excess quantity to the backroom.

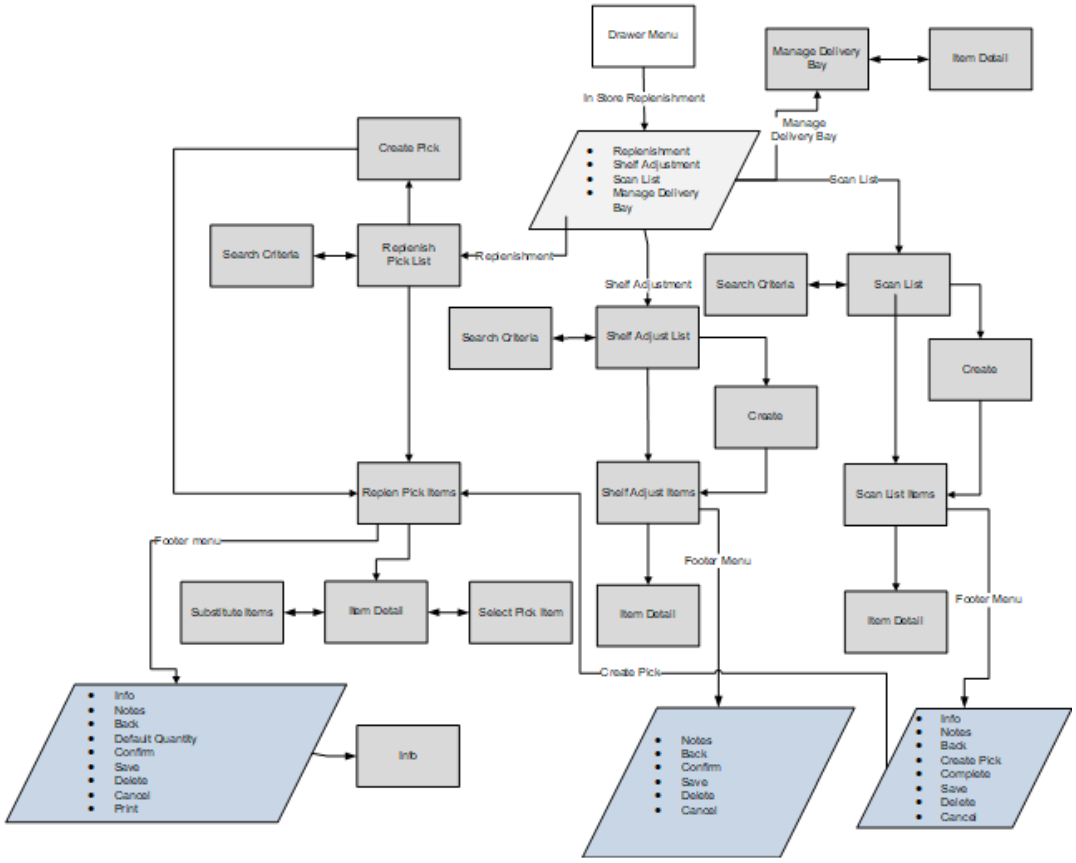
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Moving Items from Delivery Bay

Moving of items that just got received and lying at store delivery bay area can be moved to shop floor or back room. This helps the retailer to quickly replenish the needed SKUs and sell. Also, this helps the retailer to clear the inventory quickly from delivery bay and not wait for the standard process.

Screen Flow

Figure 10-2 In Store Replenishment Mobile Screen Flow



You can access the In Store Replenishment dialog from the **Drawer** menu on the mobile application.

The In Store Replenishment module in the mobile application contains Replenishment, Shelf Adjustment, Scan List and Manage Delivery Bay features.

Functionality - MAF

This section describes the available screens for:

- Replenishment

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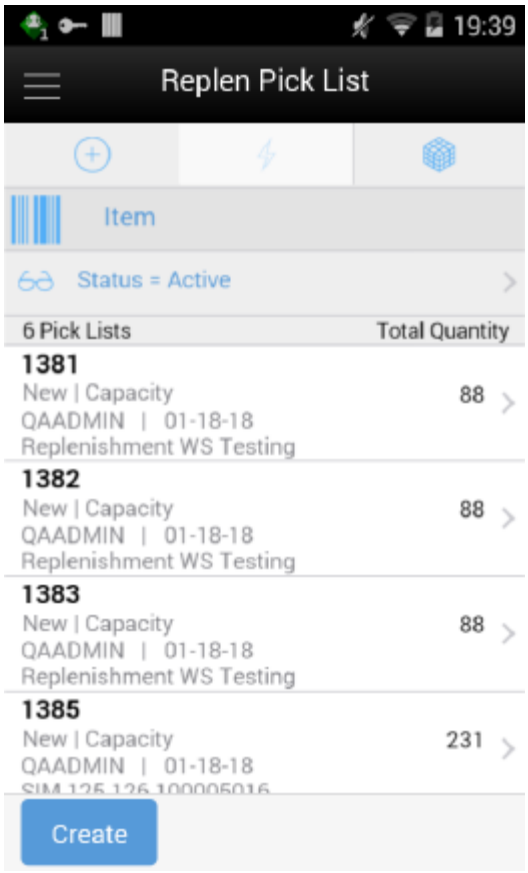
- Shelf Adjustment
- Scan List
- Manage Delivery Bay

Replenishment

- Replenishment Pick List
- Replenishment List Search Criteria
- Create Replenishment Pick
- Replenishment Pick Items
- Substitute Items
- Receive on Shop Floor

Replenishment Pick List

Figure 10-3 Replenishment Pick List



The Replenishment Pick List screen can be accessed from the In Store Replenishment menu. When you access this screen, the system will by default list the New and In Progress pick list.

The Replenishment Pick List screen allows you to create a new pick list by selecting the **Create** button. All types of replenishment lists are displayed with the total quantity to pick.

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When you select a replenishment list the system takes you to the Replenishment Pick Items screen. If you create a new replenishment list, you go to the Create Replenishment Pick screen.

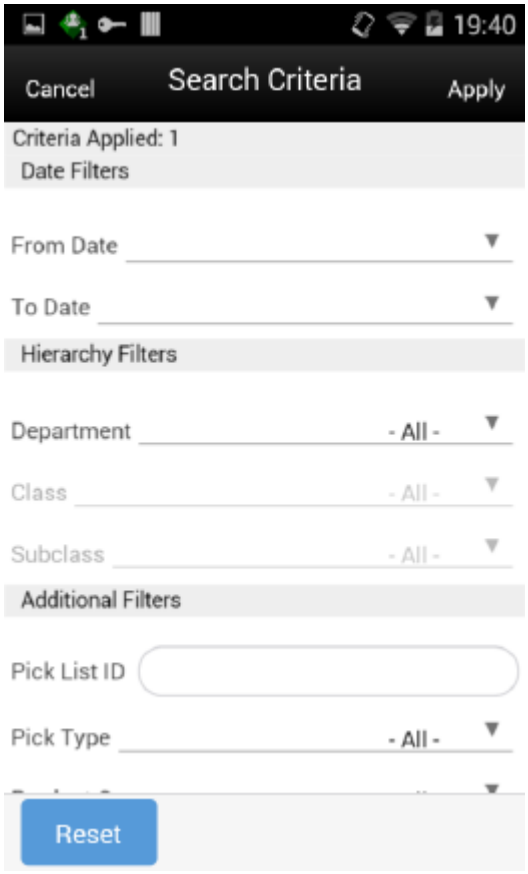
You can filter the list by selecting the pair of glass and providing the filter criteria.

The following fields are shown in the list for you to identify the pick list:

- ID -The unique replenishment id created by the system.
- Total number of quantity in the pick list.
- Status of the pick.
- Pick Type
  - Four types of in store replenishment methods can be defined here: Capacity, Sales, Display and Gap.
- Updated User, Create Date and the Description of the pick.

Replenishment List Search Criteria

Figure 10-4 Replenishment List Search Criteria Screen



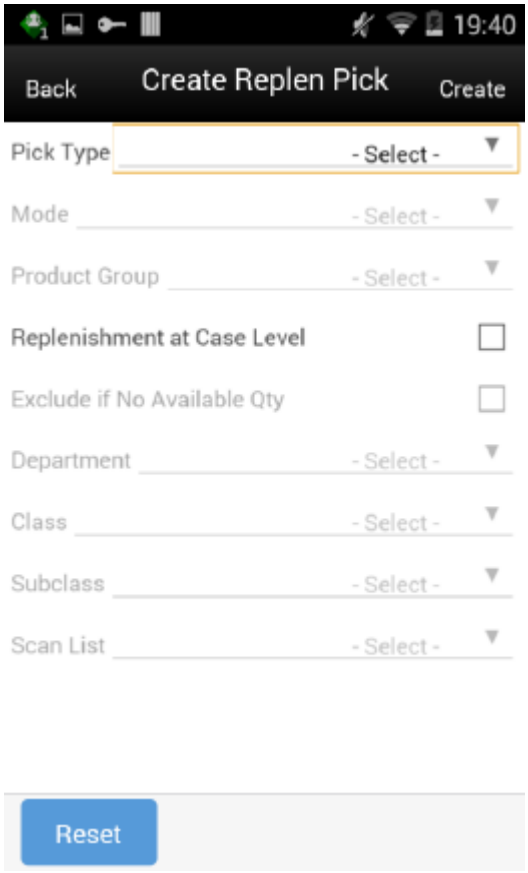
The Replenishment List Search Criteria screen can be accessed from selecting the eye glasses from the Replenishment Pick List screen. This helps to limit the search on Replenishment Pick List screen through date, hierarchy, and various additional filters which includes search fields Pick List Id, Pick type, Product Group, Mode, Scan List, Item and so on.

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After applying the search criteria, you return to the Replenishment List screen with the results filtered based on the given criteria.

Create Replenishment Pick

Figure 10-5 Create Replenishment Pick Screen



The Create Replenishment Pick screen is used to create a new shelf replenishment pick list based on various criteria specified by you. This screen is accessed by selecting the **Create** button from the Replenishment Pick List screen. You can create four different types of shelf replenishment lists: Capacity, Sales, Display, and Gap based replenishment lists. Based on the replenishment list type selected, some fields will display while others will not.

Replenishment List Types

Capacity (Algorithm Based on Stock Level Percentages)

Capacity-based replenishment is dependent on the capacity defined for an item in sequencing at the shop floor. A user can choose to replenish within the day or end of the day. The difference between the capacity quantity and the actual stock on the shop floor becomes the suggested quantity to replenish. If you choose to replenish the stock within the day, you also have an option to enter a quantity to replenish considering the manpower availability. If you choose to replenish at the end of the day, it is assumed that you will have sufficient manpower and be able to replenish the full deficit.

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Capacity-based replenishment uses the difference of the shop floor capacity and the shop floor quantity to calculate the gross need of how many units need to move to the shop floor. This need is constrained by several factors, how many units are present in the back room and how many units do you actually have time to pick and move to the shop floor.

Capacity-based replenishment uses a specific algorithm to define the optimal method to replenish the shop floor quantity:

- The total capacity equals the sum of capacity for all shop floor locations.
- The Out of stock % equals the total capacity minus the shop floor quantity divided by the total capacity times 100.

Calculation:

- The Gross Need Units equals the total capacity minus the shop floor quantity.
- The item list is sorted in the order of percentage Out of stock.
- The Net Need calculation uses the total capacity, total max fill percentage, and the mode.
- The total available replenish quantity equals the back room plus the delivery bay stock. This step is only used when checking available stock on hand.
- The fill quantity equals the Net Need or the total available, whichever is smaller.
- The Within day fill will create a list until units replenished meet the within day fill quantity.
- The End of day fill will create a list with all items needing replenishment.

Sales Based

Sales-based replenishment uses a concept in which the shop floor is intact and accurate every morning. As units are sold, new units will take their place. Often if a unit is sold out, because of limited availability, a substitution will be used to replenish. When the substitute is sold, the substitute will be replenished. The advantage of this type of method is sequencing is not required since everything replenished is based on sold units.

A user can choose to replenish within the day or at the end of the day. If you choose to replenish within the day, they have an option to enter the quantity they have time to replenish. This replenishment quantity is restricted by the quantity entered by you and is pro-rated. If you choose to replenish at the end of the day, it assumes sufficient manpower will be able to replenish the suggested quantity.

This method is mostly used by fashion retailers who have no defined capacity and many items that are single size/color/style items. It often is used in conjunction with substitution to allow them to keep the shop floor looking filled by substituting the sold unit with one that is in the back room.

> **Note**
>
> This method will often be used with the option to ignore available inventory. This allows "out of stock" items on the replenishment list to be substituted.

Gap Scanning (Empty Shelf Scanning)

The Gap scanning method replenishment is the easiest method of all the various types of shelf replenishment. With this method, you scan the goods that need replenishment, and a replenishment list is created from the units scanned.

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The system uses this replenishment list to move the goods from the back room to the shop floor based on back room availability. The reason to have a separate process between scanning and generating is that one user can create a list and another user can execute the shelf replenishment allowing for distribution of workload.

Since this process does not have a dependency with either sales or capacity, it gives an advantage to the retailer to move goods without any complex setup.

Display (Sales Floor/ Shop Floor)

The shelf replenishment method of Display stock replenishment is fully based on the idea that if a customer does not see the item on the shop floor, they do not know the item exists.

This method provides a way to reduce the inefficiency of receiving new styles in the back room, and not having full knowledge of what is displayed and what should be moved from the back room to the shop floor.

The generic process is you will scan all display stock items, and then compare them against a product group with all the styles available for that department. You will then identify what is the differentiator needed to be displayed on the floor. Often this is color.

Because this type of method is often used in a fashion setting, it does not require sequencing or capacity at all. Capacity need is always one item per primary differentiator.

A product group is required to set up with all the items on a shelf. The following table is an example which shows six items with various colors and sizes. For the comparison between shop floor display and back room, all of the items need to be set up in the product group.

Next, a shelf adjustment list needs to be created by scanning the items on display. For this example, you only have item 124 on the display shelf.

Item ID	Diff 1	Diff2
123	Black	S
124	Black	M
125	Black	L
234	Red	S
235	Red	M
236	Red	L

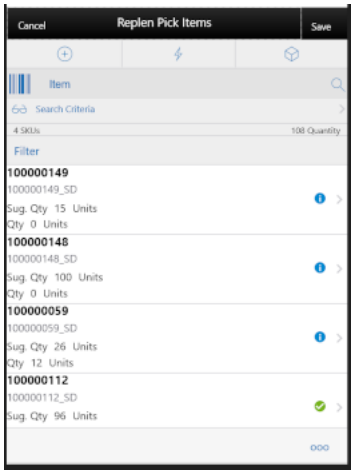
While creating the product group, you selected to sort by the color. Since the scanned item is black, the sorting is by color. The system will try to find a different color available in the back room. After the comparison between the two lists, the system tells you item 236 needs to be replenished.

> **Note**
>
> The suggested red item to be replenished will depend on available back room inventory and the sort of the second differentiator. If Diff 2 had been defined differently, such as L = 10, M = 08, and S = 06, then item 234 would have been recommended instead for replenishment.

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Replenishment Pick Items

Figure 10-6 Replenishment Pick Items



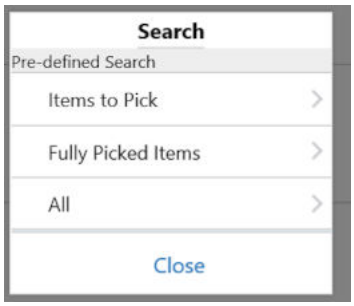
This screen is accessed by selecting a replenishment list from the Replenishment Pick List screen or when creating a new pick. You need proper permissions to reach this screen. Selecting an item from the pick items will take you to the Item Detail screen.

Clicking on the Search Criteria (eye glasses) takes you to the Search Popup which displays list of pre-defined searches.

You can access the footer menu by selecting the ellipsis button and perform various functions like viewing the Information of the pick, Default the pick quantity with the actual quantity, confirm the pick, edit CFAs, save, cancel, print, and go back and delete the pick.

Search Popup

Figure 10-7 Search Popup



The Search Criteria popup is accessed by selecting 'Search Criteria (eye glasses) from the Replenishment Pick Items screen.

This popup provides the user with the list of pre-defined searches that enables the user to quickly find the list of items based on their picked quantity.

The list of pre-defined searches available are:

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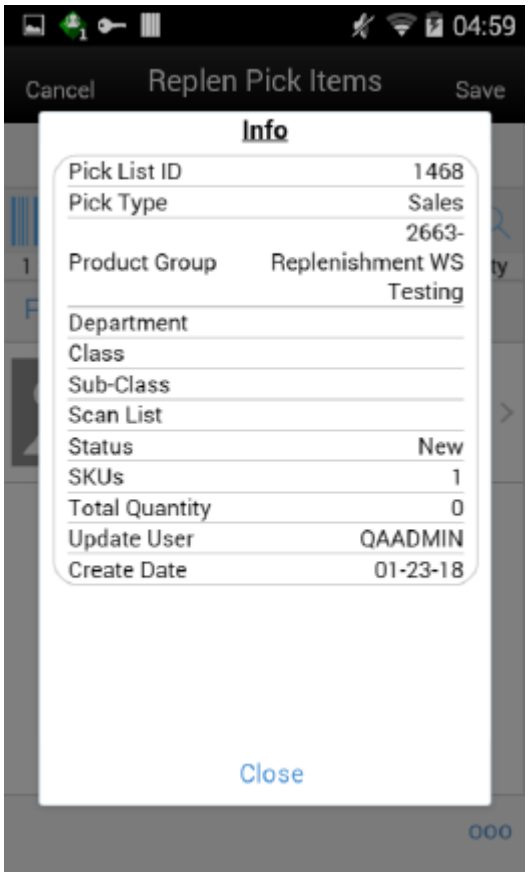
1. **Items to Pick** - Selecting this option, will list the partially picked or non-picked items(Actual pick qty = zero OR Actual pick qty < Suggested Pick Qty OR Actual pick qty = NULL) in the Replen Pick Items screen.
2. **Fully Picked Items** - Selecting this option, will list the fully picked items (Actual pick qty = Suggested Pick Qty) in the Replen Pick Items screen.
3. **All** - Selecting this option will display all items irrespective of whether they were picked or not.

These searches will also include Substitute Items. The substitute Items will always be grouped together with the original item.

If the search did not return any records, an empty list will be displayed in the Replen Pick List screen.

Replenishment Info

Figure 10-8 Replenishment Pick Items Info Screen



The Replenishment Info screen is accessed by selecting info option from the Replenishment Pick Items screen.

This screen provides the information about the pick which includes the Pick List Id, Pick type, Product Group, hierarchy info, scan list and so on.

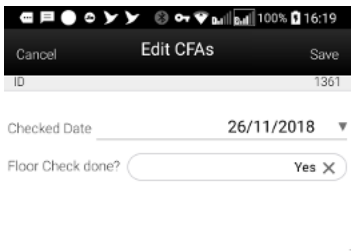
This screen will also display the CFAs captured for the replenishment pick list.

This is an informational popup screen, and it is read only.

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Edit CFAs

Figure 10-9 Edit CFAs

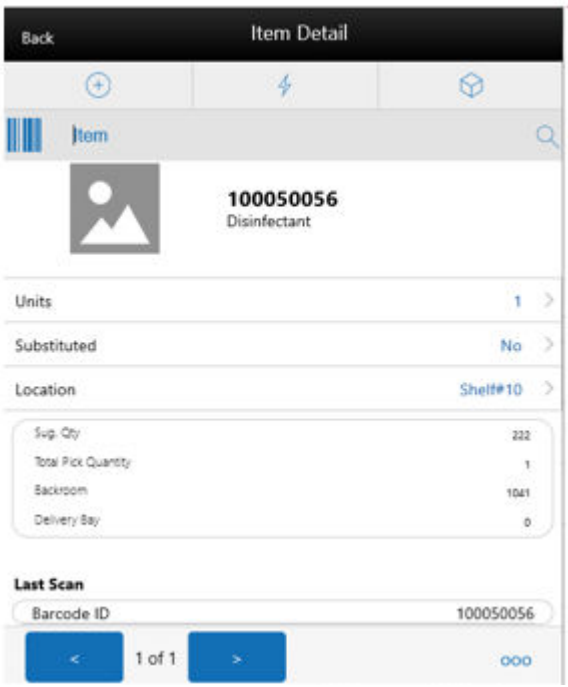


The Edit CFAs screen displays the list of CFAs (flexible attributes) that have been set up for Replenishment Pick List in the system. This screen allows you to capture values for them. The fields displayed here are based on what is setup for the Replenishment Pick List. The CFAs that are set up as 'Required' must have a value entered for it before confirming the pick. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the mobile application. Appropriate security permission is needed, and the list must be in editable state for entering CFA values.

Replenishment Pick Item Detail

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Figure 10-10 Replenishment Pick Item Detail



This item detail screen is accessed by selecting an item or when scanning an item from the Replenishment Pick Items screen.

User may also scan the same item or a different item from this screen. The information will be retained for the replenishment pick list you are currently working in, until you leave the replenishment pick list. Select **Save** from the Replenishment Pick Items screen to permanently save the item information. There is no Save on the Item Detail screen.

If the user has used a pre-defined search in the Replenishment Pick Items, the Item Detail screen should be limited to only the items returned by the search.

Scanning or entering an item on this screen will refresh this screen for the item scanned/ entered.

The substituted field displays whether an item has substitute item(s) associated with it and if selected it also allows you to navigate to the substitute items screen to add substitute items.

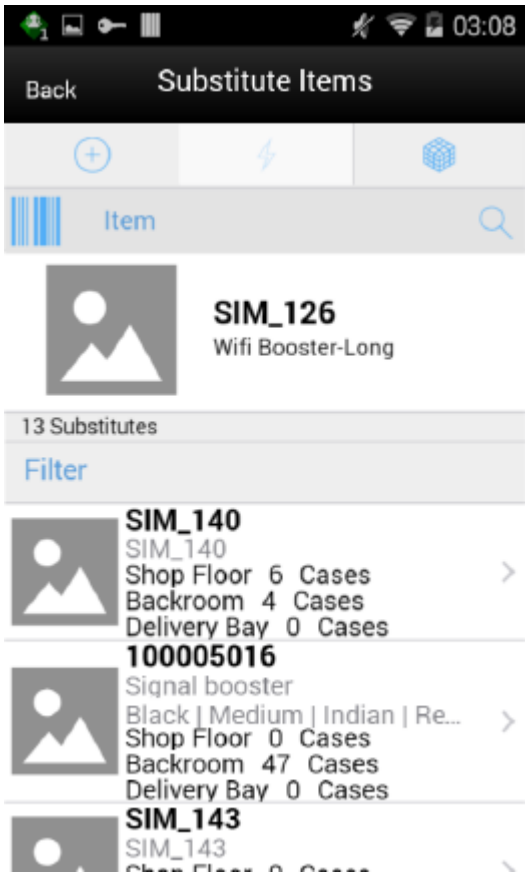
At the bottom of the screen the details of the last scanned barcode will be displayed.

You can access the footer menu by selecting the ellipsis button to reset the item or go to substitute items screen.

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Substitute Items

Figure 10-11 Substitute Items Screen



The Substitute Items screen is used to find a substitute item when the requested item has no inventory. The Substitute Items screen can be accessed from the Replenishment Pick Item Detail screen by tapping the Substituted field. Using item substitution helps maintain a better fill rate within different areas of the store. The substitutions can be recommended by corporate, or they can be ad hoc picked depending on system settings. Depending on security permissions, you can be restricted to just the corporate items or be free to select anything you want.

Receive on Shop Floor

The system allows you to indicate whether the inventory is received on the shop floor directly. The edit container screens in DSD Receiving and Transfer Receiving dialogs support to receive inventory on the shop floor. You can mark the check box Receive on shop floor. You can refer the screens in the respective sections for more details.

Shelf Adjustment

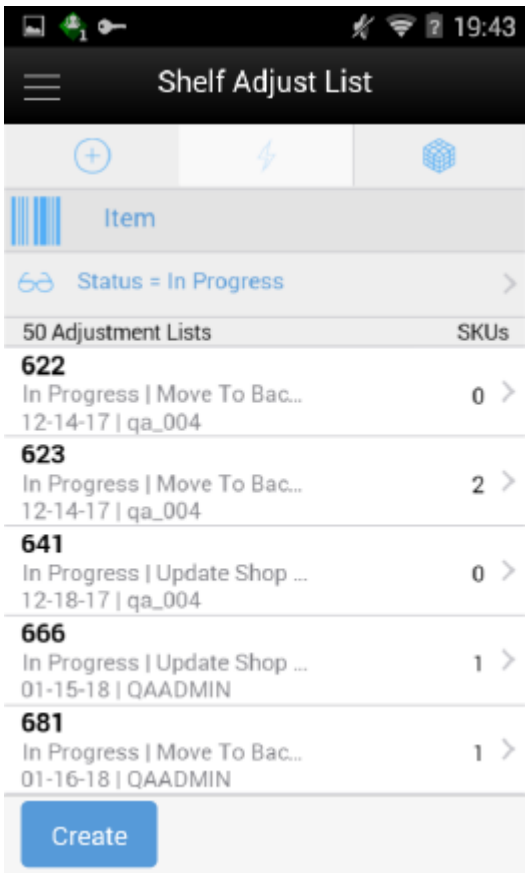
- Shelf Adjust List
- Create Shelf Adjust

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- Shelf Adjust Items

Shelf Adjust List

Figure 10-12 Shelf Adjust List Screen



The Shelf Adjust List screen will list the Shelf Adjustment lists that are In Progress.

You can access this screen by selecting the Shelf Adjustment menu from the In Store Replenishment menu which is available on the drawer menu.

The list includes the Move to Back Room, Update Shop Floor and Update Back Room types of shelf adjustment.

You can find the Shelf Adjustment Id, total number of items, current status, type, and the date for each adjustment list on this screen.

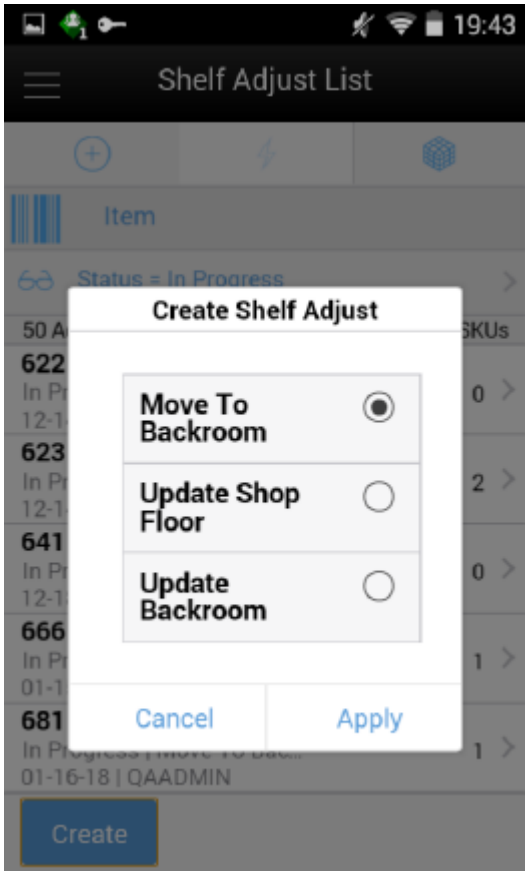
The **Create** button on this screen takes you to the Create Shelf Adjust Screen to create a new shelf adjustment list.

You can filter the list using the search criteria screen by selecting the eye glasses.

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Create Shelf Adjust

Figure 10-13 Create Shelf Adjust Screen



The Create Shelf Adjust popup screen appears when you create a new Shelf Adjust by selecting the **Create** button on the Shelf Adjust List screen.

Select the **Shelf Adjust** type to create and select the **Apply** button to create a new list. After applying the system creates a new shelf adjustment and takes you to the Shelf Adjust Items screen.

You can create any of the following types of shelf adjustment:

- Move to Back Room:

  When this list is created, the quantities scanned will be moved from the shop floor to the Back room. The quantity scanned will be subtracted from the Shop floor and added to the Back Room inventory

- Update Shop Floor:

  When this list is created, the quantities scanned will update the current available Stock On Hand on the Shop floor and replace the current quantity.

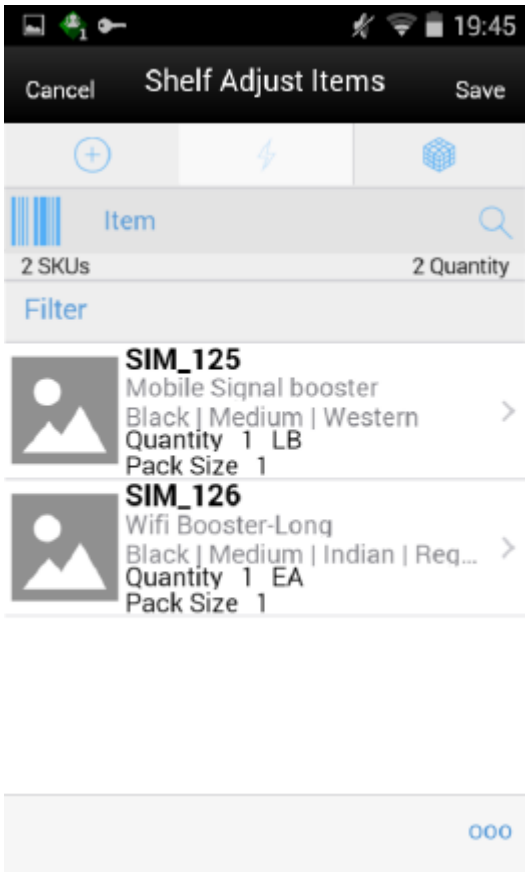
- Update Back Room:

  When this list is created, the quantities scanned will update the current available SOH in the Back Room and replace the current quantity.

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Shelf Adjust Items

Figure 10-14 Shelf Adjust Items



This screen is accessed by selecting a shelf adjust list from the Shelf Adjust List screen or when creating a new shelf adjustment. You need proper permissions to reach this screen. Selecting an item from the shelf adjust items will take you to the Item Detail screen.

You can access the footer menu by selecting the ellipsis button and perform various functions like viewing the information of the shelf adjust, Edit CFAs, confirm the shelf adjustment, save, cancel, print, and go back or delete.

The list displays the following fields with the image if configured.

Item Id, Description, Scan quantity, UOM and Pack Size.

The list also shows the following icons:

- Remove Item (trash can icon) - Selecting Remove Item will flag the item in the list of items for removal.
    1. Remove Item will be displayed upon swiping a line item from the list of items in the Shelf Adjust Items screen.
    2. User must have the Edit Shelf Adjustment security permissions to remove items from a shelf adjustment.

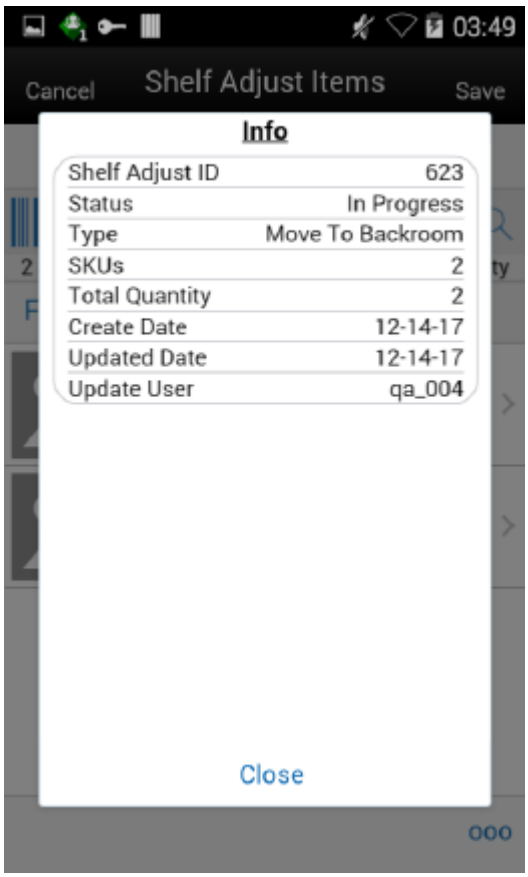
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3. The shelf adjustment must be in edit mode to remove an item.

- Restore Item (circle arrow/undo icon) - Restore Item button will only be displayed for items marked for removal.

Shelf Adjust Info

Figure 10-15 Shelf Adjust Items Info Screen



The Shelf Adjust Info screen is accessed by selecting info option from the Shelf Adjust Items screen.

This screen provides the information about the shelf adjust which includes the Shelf Adjust Id, status, type, SKUs, total quantity, create date, update date and update user.

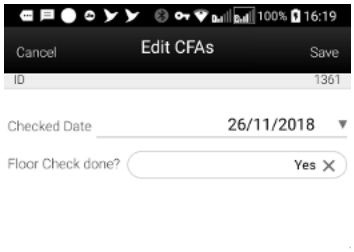
This is an informational popup screen, and it is read only.

This screen will also display the CFAs captured for the shelf adjustment.

Edit CFAs

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Figure 10-16 Edit CFAs

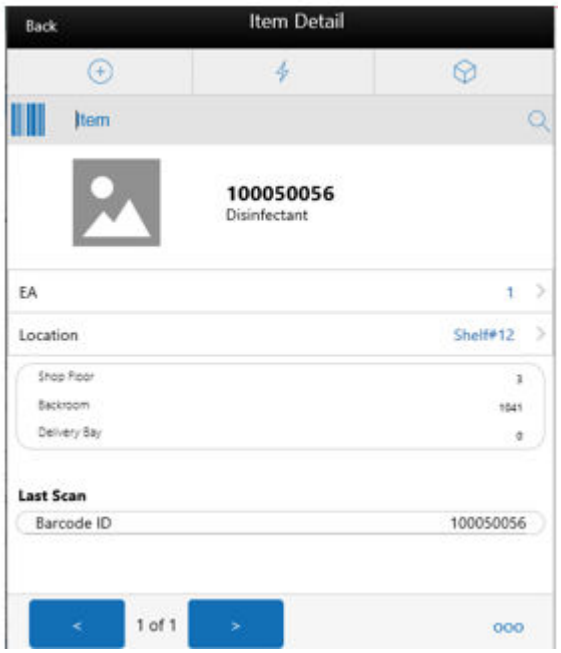


The Edit CFAs screen displays the list of CFAs (flexible attributes) that have been set up for Shelf Adjustment in the system. This screen allows you to capture values for them. The fields displayed here are based on what is setup for the Shelf Adjustment. The CFAs that are set up as 'Required' must have a value entered for it before confirming the adjustment. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the mobile application. Appropriate security permission is needed, and the adjustment record must be in editable state for entering CFA values.

Shelf Adjust Item Detail

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Figure 10-17 Shelf Adjust Item Detail



You are directed to the Item Detail screen upon tapping on an item from the Shelf Adjust Items screen.

You will also go to this screen when adding a valid item by scanning/entering from the Shelf Adjust Items screen.

User may also scan the same item or a different item from this screen. The information will be retained for the shelf adjustment you are currently working in, until you leave the shelf adjustment. Select **Save** from the Shelf Adjustment Items screen to permanently save the item information. There is no Save on the Item Detail screen.

Editable fields are displayed at the top with chevrons and non-editable fields are grouped at the bottom of the pane.

Scanning or entering an item on this screen will refresh this screen for the item scanned/ entered. At the bottom of the screen the details of the last scanned barcode will be displayed.

The screen will be in edit mode when all the following conditions are met.

- You have Edit Shelf Adjustment permissions.
- The shelf adjustment is in 'New' status.

The screen will be in view only mode when one or more of the following conditions are met:

- You have no Edit Shelf Adjustment permissions.
- The shelf adjustment is in 'Completed' status.

You can access the footer menu by selecting the ellipsis button to **Reset** the item or **Remove**/ **Restore** the item.

- If the item is flagged to remove, the item will appear "grayed out" or disabled (just the header information).

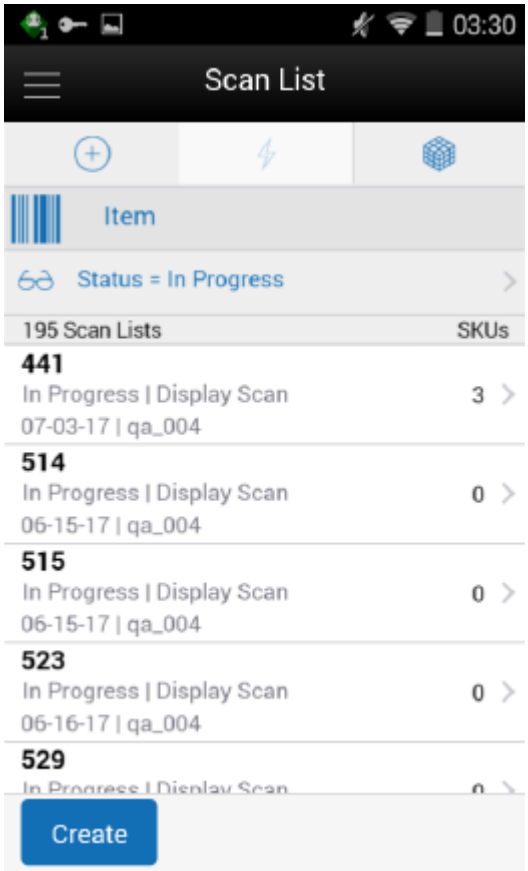
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Scan List

- Scan List
- Create Scan List
- Scan List Items
- Most Common Functional Process

Scan List

Figure 10-18 Scan List



You can access the Scan List by selecting the Scan List option from the In Store Replenishment menu available on the drawer menu.

You must have proper permissions to access this screen.

The list displays the Display and Gap Scan type of Scan List.

You can create a new scan list by selecting the **Create** button and the system will take you to the Scan List Items screen for adding the items.

If you are selecting the scan list record from the list, the system will take you to the Scan List Items screen with the items listed.

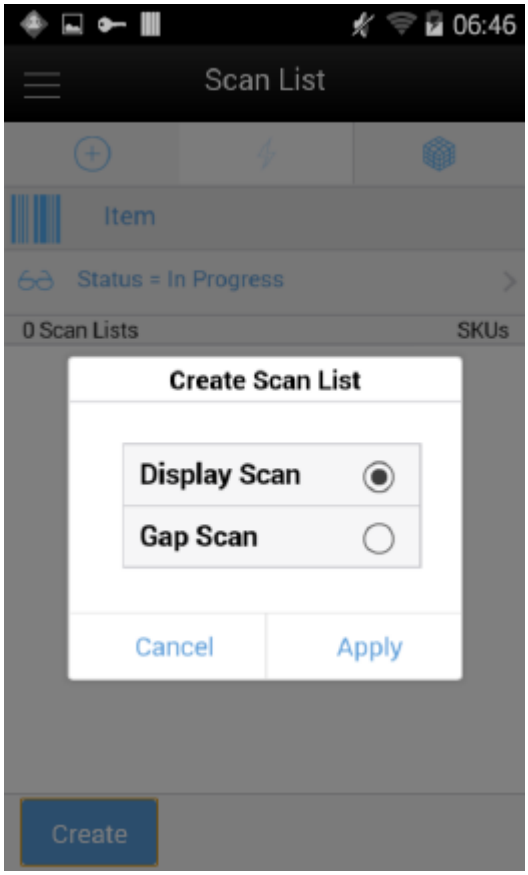
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You can filter the scan list records using the search criteria screen by selecting the eye glasses and applying the search criteria.

The screen provides the header level information such as Id, status of the scan list, type and the total SKUs of each scan list.

Create Scan List

Figure 10-19 Create Scan List Screen



The Create Scan List screen is accessed when you select the **Create** button on the Scan List screen to create a new scan list.

You can create any of the below types of Scan List by selecting the option and applying. After Applying the system creates a new scan list of the selected type and takes you to the Scan List Items screen.

Display Scan:

This list is intended for you to scan the shop floor display items. The list of scanned items will be compared when generating a pick list.

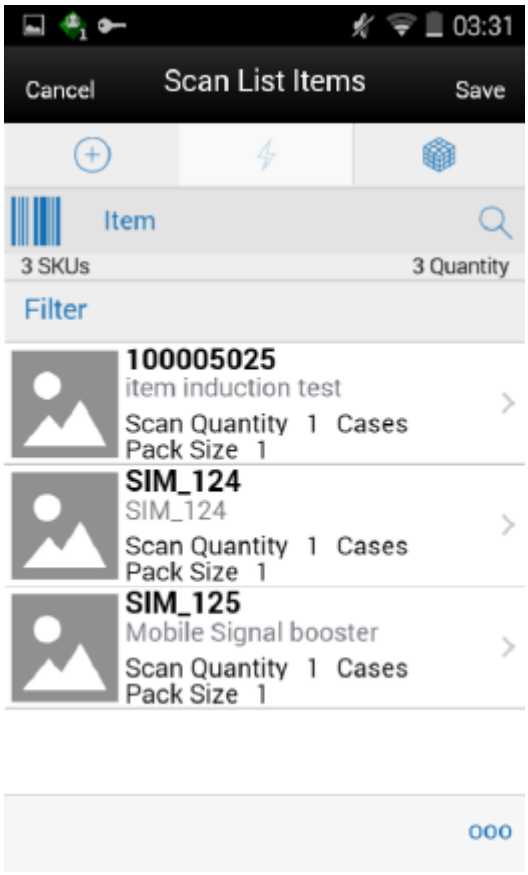
Gap Scan:

For Gap Scanning, you will scan gaps on the shelf. When the list is complete, you can save it and have it executed.

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Scan List Items

Figure 10-20 Scan List Items Screen



You can access the Scan List Items screen by selecting a scan list from the Scan List screen or when creating a new scan list after applying the selection on the Create Scan List screen.

This screen displays the items that are in the scan list.

The list displays the following fields with the image if configured.

Item Id, Description, Scan quantity, UOM and Pack Size.

The list also shows the following icons:

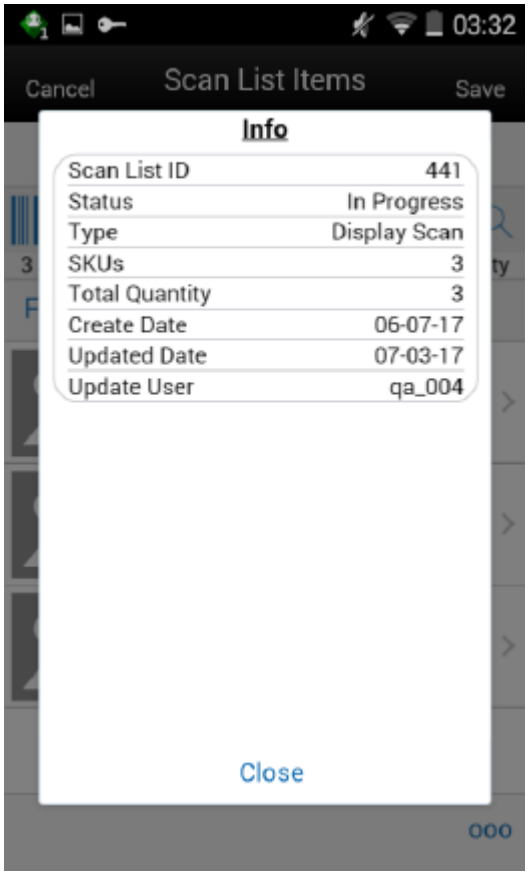
- Remove Item (trash can icon) - Selecting Remove Item will flag the item in the list of items for removal.
    1. Remove Item will be displayed upon swiping a line item from the list of items in the Scan List Items screen.
    2. User must have the Edit Scan List security permissions to remove items from an Item Scan List.
    3. The Scan List must be in edit mode to remove an item.
- Restore Item (circle arrow/undo icon) - Restore Item button will only be displayed for items marked for removal.

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You can access the footer menu by selecting the ellipsis button and perform various functions like viewing the Information of the scan list, Edit CFAs, create a pick, confirm the scan list, save, print, and cancel to go back or delete.

Scan List Info

Figure 10-21 Scan List items Info Screen



The Scan List Info screen can be accessed by selecting the Info option from the footer menu on the Scan List Items screen.

This screen provides the information about the scan list which includes the Scan List Id, status of the scan list, type of the scan list, SKUs, total quantity, create date, last update date and user.

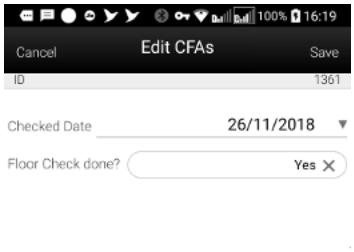
This is an informational popup and view only.

This screen will display the CFAs captured for the scan list.

Edit CFAs

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Figure 10-22 Edit CFAs

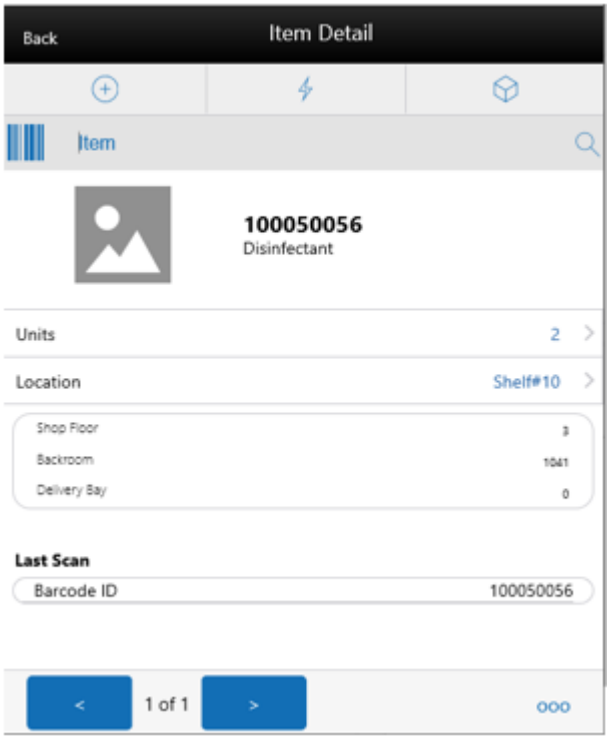


The Edit CFAs screen displays the list of CFAs (flexible attributes) that have been set up for Scan List in the system. This screen allows you to capture values for them. The fields displayed here are based on what is setup for the Scan List. The CFAs that are set up as 'Required' must have a value entered for it before confirming the scan list. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the mobile application. Appropriate security permission is needed, and the scan list record must be in editable state for entering CFA values.

Scan List Item Detail

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Figure 10-23 Scan List Item Detail



The scan list item detail screen can be accessed from the scan list items screen when selecting an item or when entering/scanning a new item to the list.

User may also scan the same item or a different item from this screen. The information will be retained for the item scan list you are currently working in, until you leave the transaction. At the bottom of the screen the details of the last scanned barcode will be displayed.

Select **Save** from the Scan List Items screen to permanently save the item information. There is no Save on the Item Detail screen.

For this screen to be in edit mode, you must have proper permissions.

This screen will be in view only mode if the status of the scan list is completed.

You can use the arrow buttons on the bottom to navigate items.

You can access the footer menu by selecting the ellipsis button on the bottom and **Remove** the item, **Restore** the item if flagged to remove and **Reset** item.

Manage Delivery Bay

- Manage Delivery Bay Screen
- Item Detail
- Move To

Overview

A delivery bay in the store is an area where inventory is received at the time the truck arrives in the store. In a normal fast based process, this inventory will be moved to the shopfloor or put

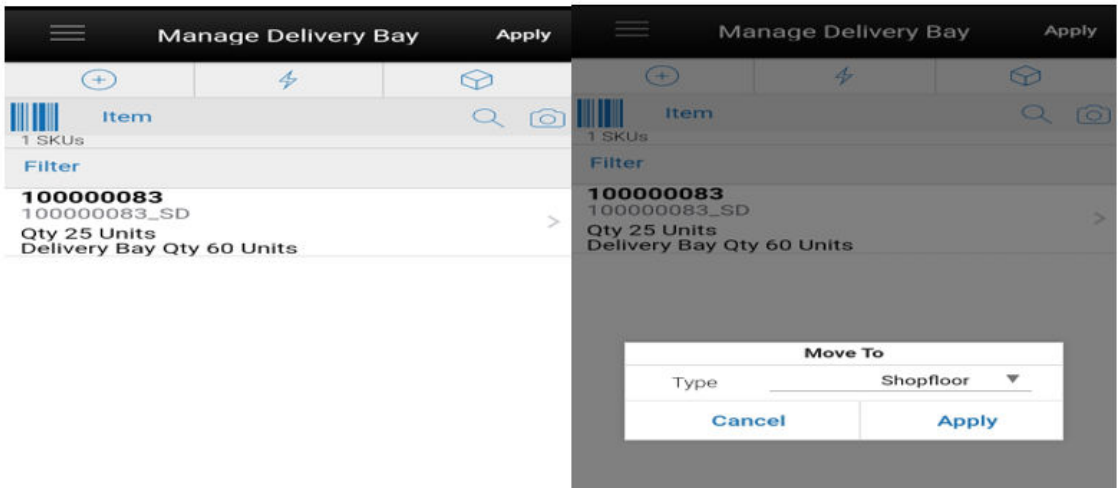
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away in the backroom and be immediately available for use. However, in some cases, the delivery load is so large, or no people are available, to manage this as part of the on-going process. For such retailers, the delivery bay allows the receiving of inventory in the backroom instead of the shopfloor or backroom.

This dialogue allows a user during the day start moving inventory from the delivery bay area to the shopfloor or backroom and not have to wait until a batch process runs to move that inventory to the backroom or shopfloor.

Manage Delivery Bay Screen

Figure 10-24 Manage Delivery Bay Screen



This dialog can be accessed from In Store Replenishment / Manage Delivery Bay. (This functionality is available only if Delivery Bay inventory is enabled in the system)

If there are delivery bay quantities available, the system will remove the inventory from the delivery bay and update the backroom or shop floor quantity.

The system provides a warning if the item entered is on a stock count that is in in progress status for the user to decide whether to move the inventory or not.

After entering an item and if a delivery bay quantity is available, the system will navigate to the item detail screen for the user to enter the quantity to move out of the delivery bay.

Upon selecting to apply the change to move inventory out of the delivery bay, the system checks whether the system is configured to move the delivery bay inventory to the shop floor or the backroom.

If the system is configured to move, the system will prompt the **Move to** popup for the user to select whether to move the inventory to the backroom or shop floor.

1. If the user selects 'Shop floor', the system will look for the capacity defined and if de-fined it will move the inventory up to the capacity level and move the rest of the quantity to the backroom. If delivery bay quantity is less than the defined quantity, the system will move all the quantities to the shopfloor.
2. If the user selects, 'Backroom', the system will move all the inventory to the back room.

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If the system is not configured to move to shop floor, the system will prompt the user for confirmation and will move the entire delivery bay movement quantity to the backroom if the user confirms.

Manage Delivery Bay - Item Detail

Figure 10-25 Manage Delivery Bay - Item Detail



The user is taken to this screen when an item is scanned on the manage delivery bay screen. On this screen, the user can scan the items that are needed to be moved out of delivery bay. As the user scans the items, the system updates the list and displays it on manage delivery bay screen.

The user can enter the quantity to move using the quantity popup.

The user can use the arrow buttons on the bottom to navigate items.

The user can access the footer menu by selecting the ellipsis button on the bottom and **Remove** the item, **Restore** the item if flagged to remove and **Reset** item.

Functionality - Jet Mobile

This section describes the available screens for:

- Replenishment
- Manage Location Inventory

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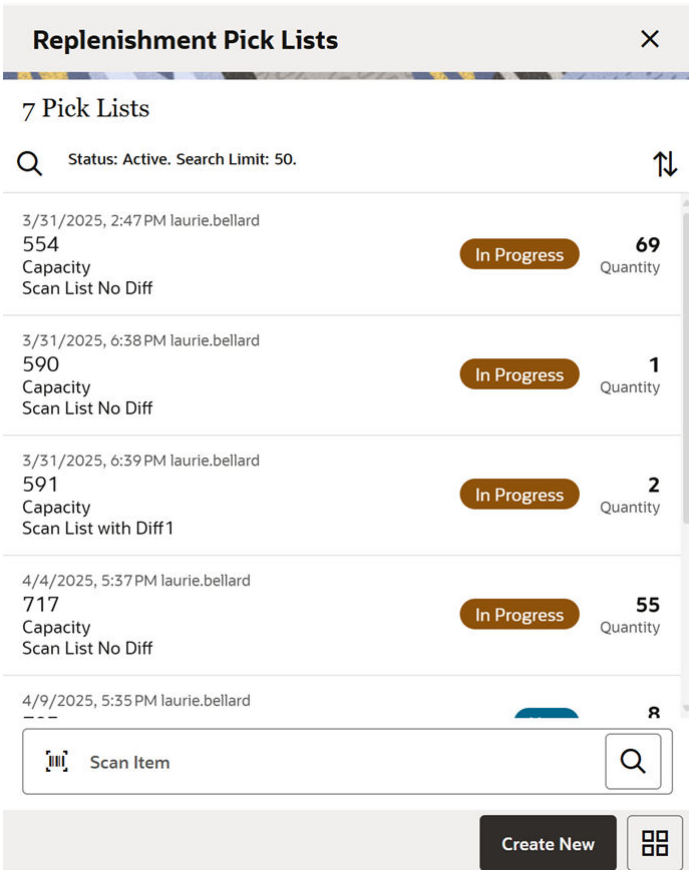
- Scan List

Replenishment

- Replenishment Pick List
- Replenishment List Search Criteria
- Create Replenishment Pick
- Replenishment Pick Items
- Substitute Items
- Receive on Shop Floor

Replenishment Pick List

Figure 10-26 Replenishment Pick List



The Replenishment Pick List screen can be accessed from the In Store Replenishment menu. When you access this screen, the system will by default list the New and In Progress pick list.

The Replenishment Pick List screen allows you to create a new pick list by selecting the **Create New** button. You will be taken to the Create Replenishment Pick screen upon selecting the **Create New** option on this screen if you have proper permissions. All types of replenishment lists are displayed with the total quantity to pick. When you select a replenishment list the system takes you to the Replenishment Pick Items screen.

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You can filter the list by selecting the pair of glass and providing the filter criteria.

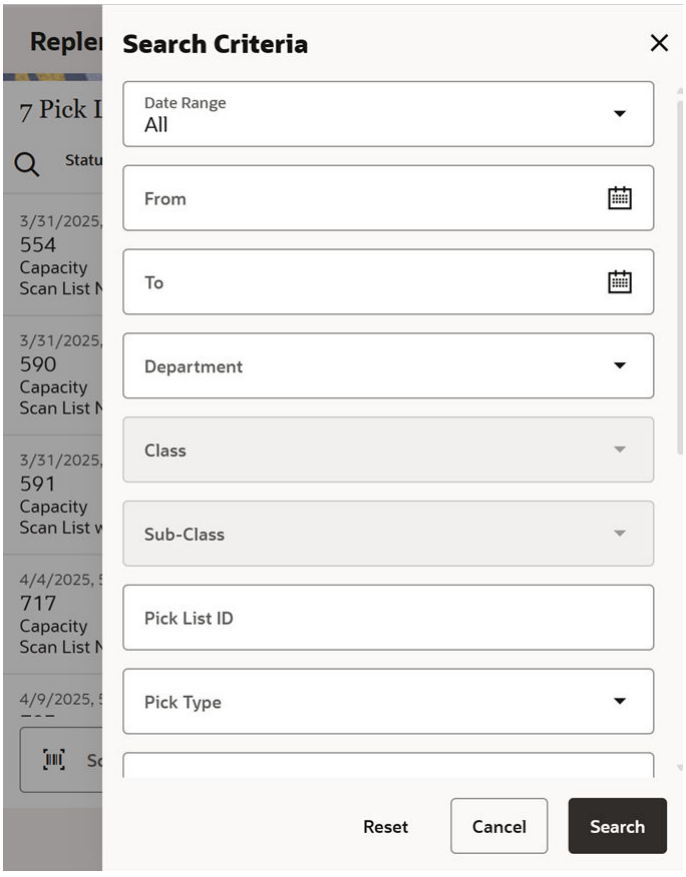
The following fields are shown in the list for you to identify the pick list:

- ID -The unique replenishment id created by the system.
- Total number of quantities in the pick list.
- Status of the pick.
- Pick Type
  - Four types of in store replenishment methods can be defined here: Capacity, Display, Gap and Sale.
- Updated User, Create Date and the Description of the replenishment pick.

On this screen, you can scan the item or search the item using the standard item lookup feature to filter the pick lists that contains the searched item.

Replenishment List Search Criteria

Figure 10-27 Replenishment List Search Criteria Screen



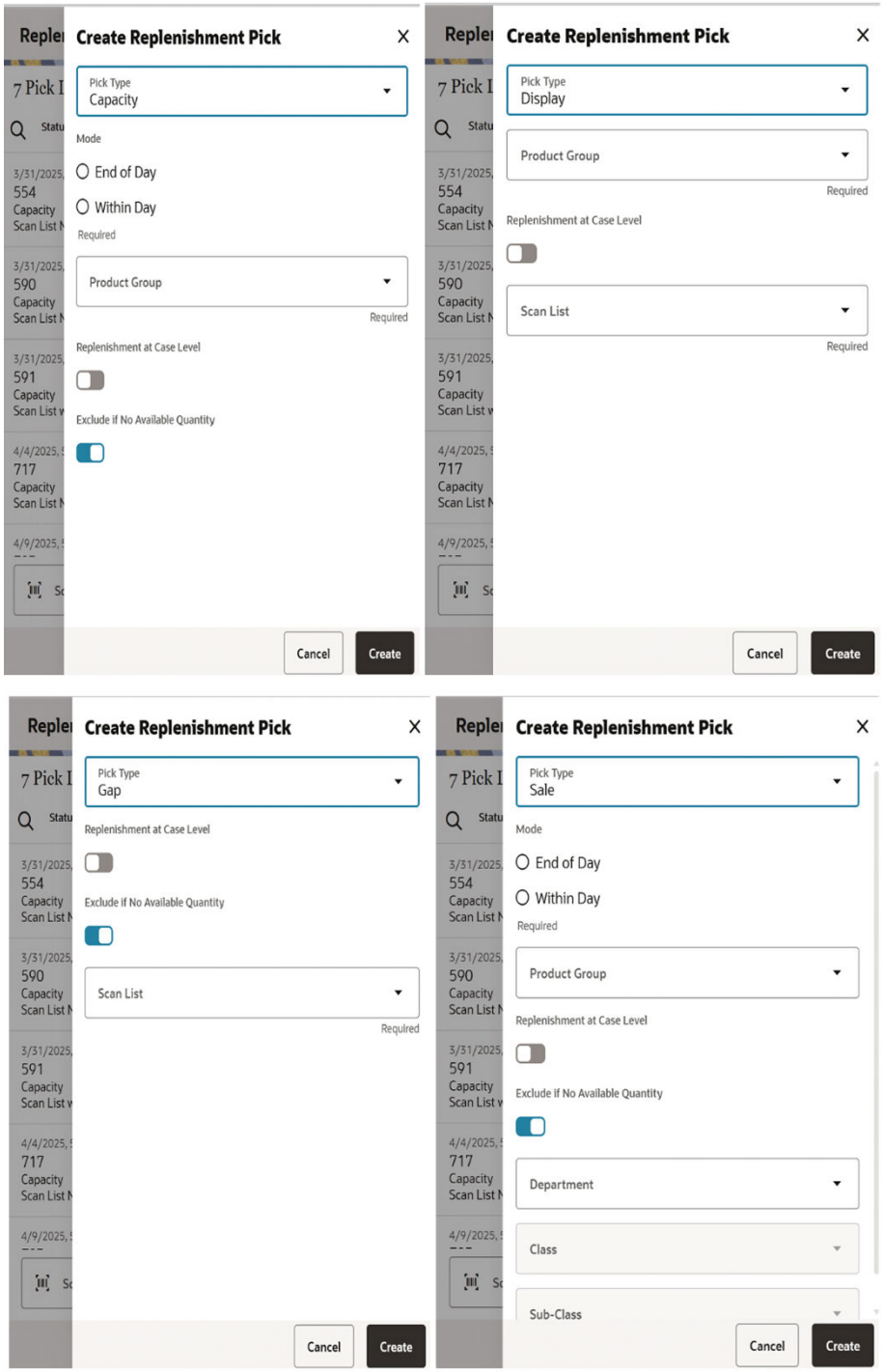
The Replenishment List Search Criteria screen can be accessed from selecting the magnifying glass from the Replenishment Pick Lists screen. This helps to limit the search on Replenishment Pick List screen through date, hierarchy, and various additional filters which includes search fields Pick List Id, Pick type, Product Group, Mode, Scan List, Item, Status and so on.

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Once done with applying the search criteria, you will return to the Replenishment Lists screen with the results filtered based on the given criteria.

Create Replenishment Pick

Figure 10-28 Create Replenishment Pick Screen



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The Create Replenishment Pick screen is used to create a new shelf replenishment pick list based on various criteria specified by you. This screen is accessed by selecting the **Create** button from the Replenishment Pick List screen. You can create four different types of shelf replenishment lists: Capacity, Sales, Display, and Gap based replenishment lists. Based on the replenishment list type selected, some fields will display while others will not.

Replenishment List Types

Capacity (Algorithm Based on Stock Level Percentages)

Capacity-based replenishment is dependent on the capacity defined for an item in sequencing at the shop floor. A user can choose to replenish within the day or end of the day. The difference between the capacity quantity and the actual stock on the shop floor becomes the suggested quantity to replenish. If you choose to replenish the stock within the day, you also have an option to enter a quantity to replenish considering the manpower availability. If you choose to replenish at the end of the day, it is assumed that you will have sufficient manpower and be able to replenish the full deficit.

Capacity-based replenishment uses the difference of the shop floor capacity and the shop floor quantity to calculate the gross need of how many units need to move to the shop floor. This need is constrained by several factors, how many units are present in the back room and how many units do you actually have time to pick and move to the shop floor.

Capacity-based replenishment uses a specific algorithm to define the optimal method to replenish the shop floor quantity:

- The total capacity equals the sum of capacity for all shop floor locations.
- The Out of stock % equals the total capacity minus the shop floor quantity divided by the total capacity times 100.

Calculation:

- The Gross Need Units equals the total capacity minus the shop floor quantity.
- The item list is sorted in the order of percentage Out of stock.
- The Net Need calculation uses the total capacity, total max fill percentage, and the mode.
- The total available replenish quantity equals the back room plus the delivery bay stock. This step is only used when checking available stock on hand.
- The fill quantity equals the Net Need or the total available, whichever is smaller.
- The Within day fill will create a list until units replenished meet the within day fill quantity.
- The End of day fill will create a list with all items needing replenishment.

Sales Based

Sales-based replenishment uses a concept in which the shop floor is intact and accurate every morning. As units are sold, new units will take their place. Often if a unit is sold out, because of limited availability, a substitution will be used to replenish. When the substitute is sold, the substitute will be replenished. The advantage of this type of method is sequencing is not required since everything replenished is based on sold units.

A user can choose to replenish within the day or at the end of the day. If you choose to replenish within the day, they have an option to enter the quantity they have time to replenish. This replenishment quantity is restricted by the quantity entered by you and is pro-rated. If you choose to replenish at the end of the day, it assumes sufficient manpower will be able to replenish the suggested quantity.

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This method is mostly used by fashion retailers who have not defined capacity and who have many items that are single size/color/style items. The method indicates to the user what was sold over a period of time, which allows the user to replenish like item with like item. It is often used in conjunction with substitution to allow them to keep the shop floor looking filled by substituting the sold unit with one that is in the back room.

Based on the Default to Include Previous Day Sales parameter, the system determines whether to include the previous day sales or not for deriving the suggested quantity.

If the value set is Yes, the suggested pick quantity will consider any sales that occurred from the last time it picked (it could be previous day) until the current pick time.

For example:

Last Pick Time is April 30th 4.30 PM. 20 units to be picked and user picks only 15 (balance=5).

Sales occurred on April 30th after 4.30 PM until midnight is say 10 quantities.

Sales occurred on May 1 after the midnight is say 15 quantities until the pick time say May 1st 10:15 AM.

Now the Total Pick quantity is 5+10+15=30.

If the value set is No, the suggested pick quantity is based on the sales that occurred for the current day minus any quantities already picked since start of the day (i.e. midnight). At the start of each day, the last pick time will be reset.

In this example: On May 1, the first replenishment pick generated at 10:15AM includes sales from midnight until 10:15AM. If a second replenishment pick is generated at 2:15PM, the system will use sales that occurred from midnight until 2:15PM minus what was picked by the first pick run.

> **Note**
>
> This method will often be used with the option to ignore available inventory. This allows "out of stock" items on the replenishment list to be substituted.

Gap Scanning (Empty Shelf Scanning)

The Gap scanning method replenishment is the easiest method of all the various types of shelf replenishment. With this method, you scan the goods that need replenishment, and a replenishment list is created from the units scanned.

The system uses this replenishment list to move the goods from the back room to the shop floor based on back room availability. The reason to have a separate process between scanning and generating is that one user can create a list and another user can execute the shelf replenishment allowing for distribution of workload.

Since this process does not have a dependency with either sales or capacity, it gives an advantage to the retailer to move goods without any complex setup.

Display (Sales Floor/ Shop Floor)

The shelf replenishment method of Display stock replenishment is fully based on the idea that if a customer does not see the item on the shop floor, they do not know the item exists.

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This method provides a way to reduce the inefficiency of receiving new styles in the back room, and not having full knowledge of what is displayed and what should be moved from the back room to the shop floor.

The generic process is you will scan all display stock items, and then compare them against a product group with all the styles available for that department. You will then identify what is the differentiator needed to be displayed on the floor. Often this is color.

Because this type of method is often used in a fashion setting, it does not require sequencing or capacity at all. Capacity need is always one item per primary differentiator.

A product group is required to set up with all the items on a shelf. The following table is an example which shows six items with various colors and sizes. For the comparison between shop floor display and back room, all of the items need to be set up in the product group.

Next, a scan list needs to be created by scanning the items on display. For this example, you only have item 124 on the display shelf.

Item ID	Diff 1	Diff2
123	Black	S
124	Black	M
125	Black	L
234	Red	S
235	Red	M
236	Red	L

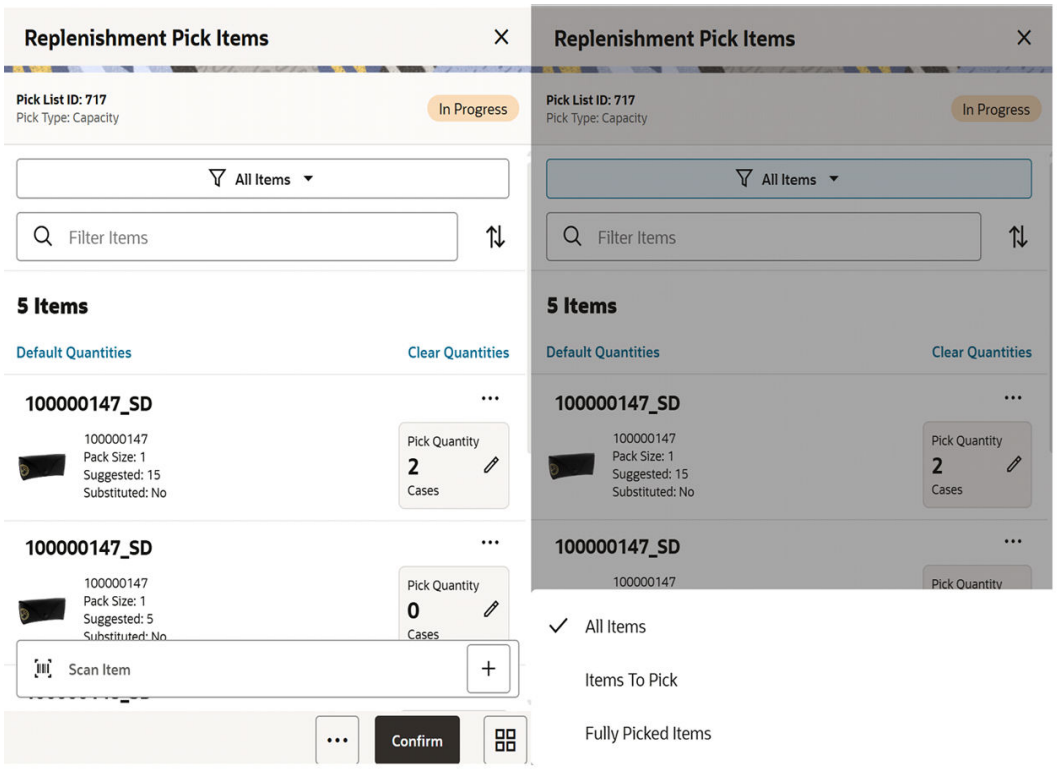
While creating the product group, you selected to sort by the color. Since the scanned item is black, the sorting is by color. The system will try to find a different color available in the back room. After the comparison between the two lists, the system tells you item 236 needs to be replenished.

> **Note**
>
> The suggested red item to be replenished will depend on available back room inventory and the sort of the second differentiator. If Diff 2 had been defined differently, such as L = 10, M = 08, and S = 06, then item 234 would have been recommended instead for replenishment.

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Replenishment Pick Items

Figure 10-29 Replenishment Pick Items



This screen is accessed by selecting a replenishment list from the Replenishment Pick List screen or when creating a new pick. You need proper permissions to reach this screen. Selecting an item from the pick items will take you to the Item Detail screen.

You can filter the list with the pre-defined searches by selecting the filter option. The filter menu provides the following ways to filter.

- **All Items**- Selecting this option will display all items irrespective of whether they were picked or not.
- **Items to Pick** - Selecting this option, will list the partially picked or non-picked items(Actual pick qty = zero OR Actual pick qty < Suggested Pick Qty OR Actual pick qty = NULL) in the Replen Pick Items screen.
- **Fully Picked Items** - Selecting this option, will list the fully picked items (Actual pick qty = Suggested Pick Qty) in the Replen Pick Items screen.

These searches will also include Substitute Items. The substitute Items will always be grouped together with the original item.

If the search did not return any records, an empty list will be displayed in the Replen Pick List screen.

The **Default Quantities** option on this screen allows you to default the suggested pick quantity to the actual pick quantity.

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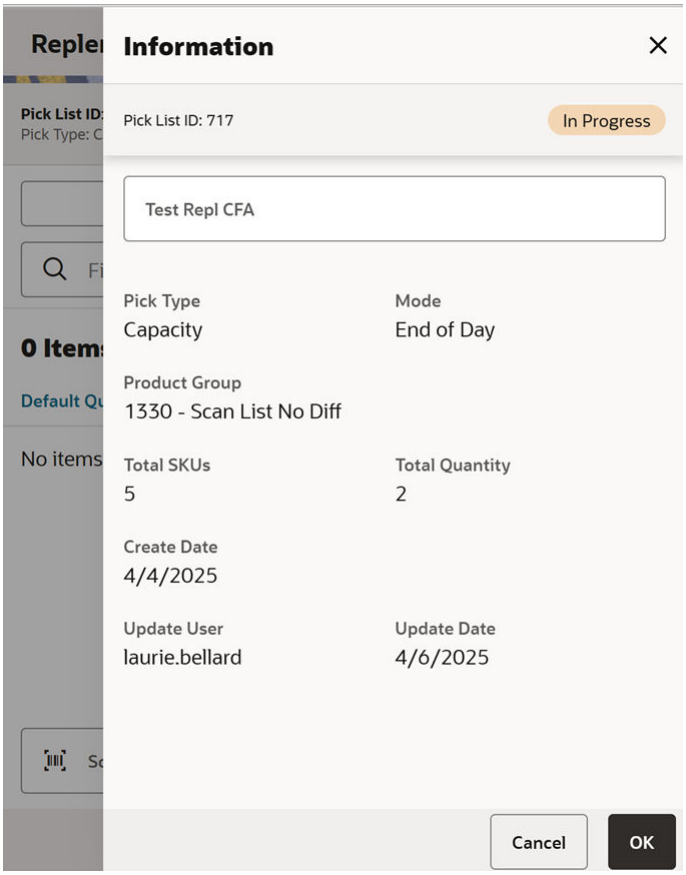
The **Clear Quantities** option will clear any quantities populated in the current session (before saving)

You can confirm the pick by selecting the Confirm button on the bottom or from the footer menu.

You can access the footer menu by selecting the ellipsis button and perform various functions like Notes, Print, viewing the Information of the pick and edit CFAs, confirm the pick, Save and Exit, cancel and delete the pick.

Replenishment Info

Figure 10-30 Replenishment Pick Items Info Screen



The Replenishment Info screen is accessed by selecting the info option from the Replenishment Pick Items screen.

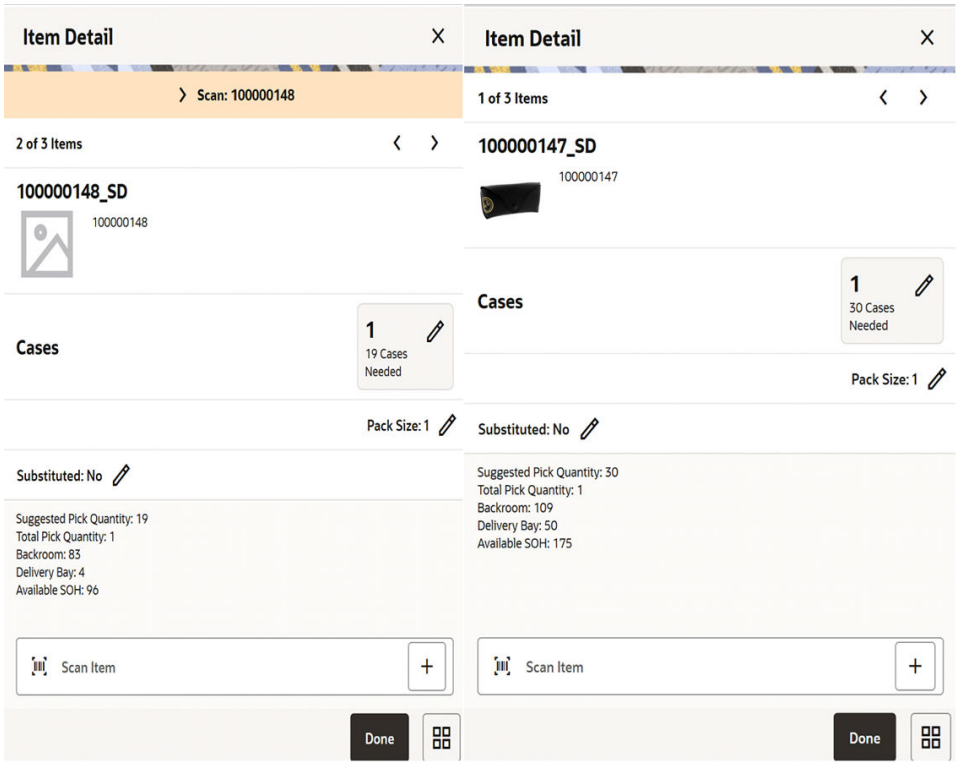
This screen provides the information about the pick which includes the Pick List Id, Pick type, Product Group, hierarchy info, scan list and so on.

This screen also displays the list of CFAs (flexible attributes) that have been set up for Replenishment Pick List in the system and allows you to capture values for them. The fields displayed here are based on what is setup for the Replenishment Pick List. The CFAs that are set up as 'Required' must have a value entered for it before confirming the scan list. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the mobile application. Appropriate security permission is needed, and the pick list record must be in editable state for entering CFA values.

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Replenishment Pick Item Detail

Figure 10-31 Replenishment Pick Item Detail Screen



This item detail screen is accessed by selecting an item or when scanning an item from the Replenishment Pick Items screen.

User may also scan the same item or a different item from this screen. The information will be retained for the replenishment pick list you are currently working in, until you leave the replenishment pick list. Select **Save** from the Replenishment Pick Items screen to permanently save the item information. There is no Save on the Item Detail screen.

If you have used a pre-defined search in the Replenishment Pick Items, the Item Detail screen should be limited to only the items returned by the search.

Scanning or entering an item on this screen will refresh this screen for the item scanned/ entered.

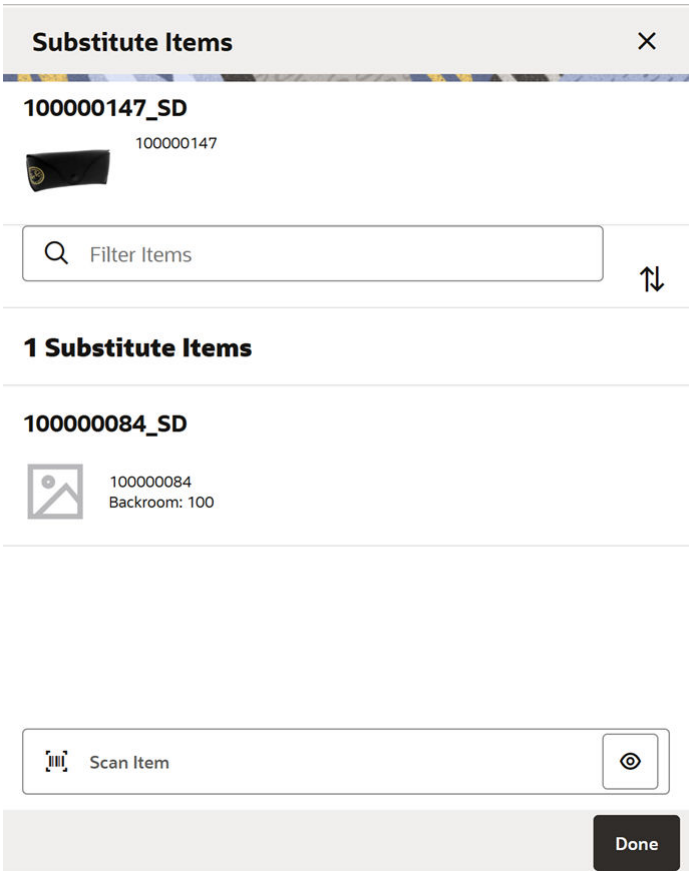
The substituted field displays whether an item has substitute item(s) associated with it and if selected it also allows you to navigate to the substitute items screen to add substitute items.

If you have scanned an item, the system displays the last scanned barcode.

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Substitute Items

Figure 10-32 Substitute Items Screen



The Substitute Items screen is used to find a substitute item when the requested item has no inventory. The Substitute Items screen can be accessed from the Replenishment Pick Item Detail screen by selecting the Substituted pencil icon. Using item substitution helps maintain a better fill rate within different areas of the store. The substitutions can be recommended by corporate, or they can be ad hoc picked depending on system settings. Depending on security permissions, you can be restricted to just the corporate items or be free to select anything you want.

Receive on Shop Floor

The system allows you to indicate whether the inventory is received on the shop floor directly. The edit container screens in DSD Receiving and Transfer Receiving dialogs support to receive inventory on the shop floor. You can select to Receive on shop floor. You can refer the screens in the respective sections for more details.

Manage Location Inventory

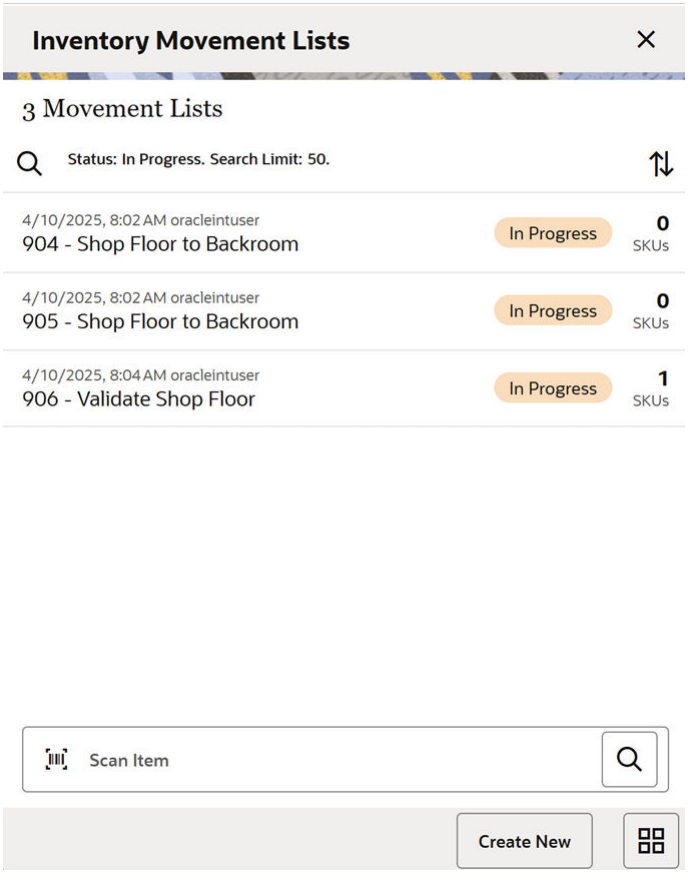
- Inventory Movement Lists
- Create Inventory Movement

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- Inventory Movement Items

Inventory Movement Lists

Figure 10-33 Inventory Movement Lists Screen



The Inventory Movement Lists screen will list the Inventory Movement lists that are In Progress.

You can access this screen by selecting the Manage Location Inventory menu from the In Store Replenishment menu which is available on the drawer menu.

The Manage Location Inventory dialog supports the following type of movements and those are listed here on this screen.

1. Move to Backroom from Shop Floor
2. Validate Shop floor, Balance Backroom
3. Validate Backroom, Balance Shop Floor
4. Move to Shop Floor from Delivery Bay
5. Move to Backroom from Delivery Bay

On the list you can find the Inventory movement ID, total number of items, current status, type, and the date for each movement.

The **Create New** button on this screen takes you to the Create Inventory Movement screen to create a new inventory movement list.

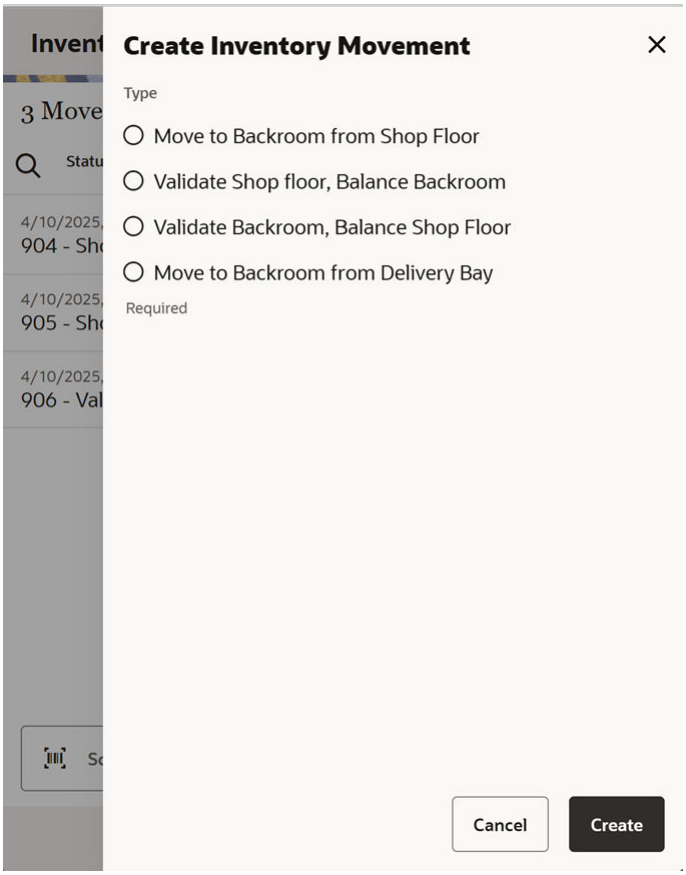
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You can filter the list using the search criteria screen by selecting the magnifying glass.

On this screen, you can scan the item or search the item using the standard item lookup feature to filter the movement lists that contains the searched item.

Create Inventory Movement

Figure 10-34 Create Inventory Movement Screen



The Create Inventory Movement screen appears when you select the Create New option from the Inventory Movement Lists screen.

On this screen, you can select the movement type and select Create a new list. Upon selecting Create, the system creates a new list and takes you to the Inventory Movement Items screen to add items.

You can create any of the following types of movement lists.

The Inventory Movement type options shown here are based on the permissions you have.

1. **Move to Backroom from Shop Floor**
   a. This option is displayed only when the Display Shop Floor/Backroom Quantity is turned on.
   b. The list is created, the quantities scanned will be moved from the shop floor to the Backroom.

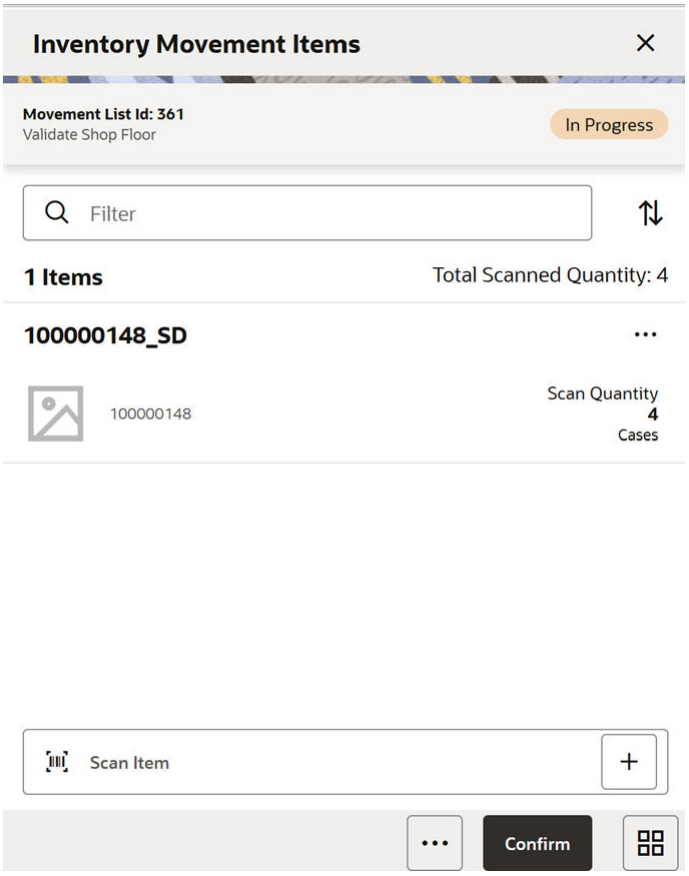
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2. **Validate Shop Floor, Balance Backroom**
    a. This option is displayed only when the Display Shop Floor/Backroom Quantity is turned on.
    b. When the list is created, the quantities scanned will update the current available quantity on the Shop floor and balance the backroom quantity.
        - Example: Item 1 having Backroom quantity=100, Shop Floor Quantity=3, SOH=103. Now the user creates a list with this type and scans quantity of 10. After the updates, the Backroom quantity will be 93, Shop Floor Quantity=10 and SOH will remain 103.
3. **Validate Backroom, Balance Shop Floor**
    a. This option is displayed only when the Display Shop Floor/Backroom Quantity is turned on.
    b. When the list is created, the quantities scanned will update the current available SOH in the Backroom and balance the Shop Floor Quantity.
        - Example: Item 1 having Backroom quantity=100, Shop Floor Quantity=3, SOH=103. Now the user creates a list with this type and scans quantity of 90. After the updates, the Backroom quantity will be 90, Shop Floor Quantity=13 and SOH will remain 103.
4. **Move to Shop Floor From Delivery Bay**
    a. This option is displayed only when the **Allow Delivery Bay quantity to move to shop floor** store parameter is set to **Yes**.
    b. Displayed only when **Replenishment - Delivery Bay Inventory** store parameter is set to **Yes**.
    c. Displayed only when you have 'Manage Delivery Bay' permission.
    d. When this list is created, the quantities scanned will be moved from the delivery bay to Shop floor. The quantity scanned will be subtracted from the Delivery Bay and added to the Shop Floor.
    e. If this option is selected, the system will look for the capacity defined and if defined it will move the inventory to that extent and move the rest of the quantity to the backroom. If delivery bay quantity is less than the defined quantity, the system will move all the quantities.
5. **Move to Backroom From Delivery Bay**
    a. Displayed only when **Replenishment - Delivery Bay Inventory** store parameter is set to **Yes**.
    b. Displayed only when you have 'Manage Delivery Bay' permission.
    c. The list is created, the quantities scanned will be moved from the delivery bay to the Backroom. The quantity scanned will be subtracted from the delivery bay and added to the Backroom inventory.

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Inventory Movement Items

Figure 10-35 Inventory Movement Items Screen



This screen is accessed by selecting an inventory movement list from the Inventory Movement Lists screen or when creating a new movement list. You need proper permissions to reach this screen. Selecting an item from here will take you to the Item Detail screen.

You can access the footer menu by selecting the ellipsis button and perform various functions like viewing the information of the list, Notes, Confirm, Save and Exit, Cancel and Delete.

The list displays the item id and description and the scan quantity.

You can delete an item from the list by selecting the Delete option from the item level menu.

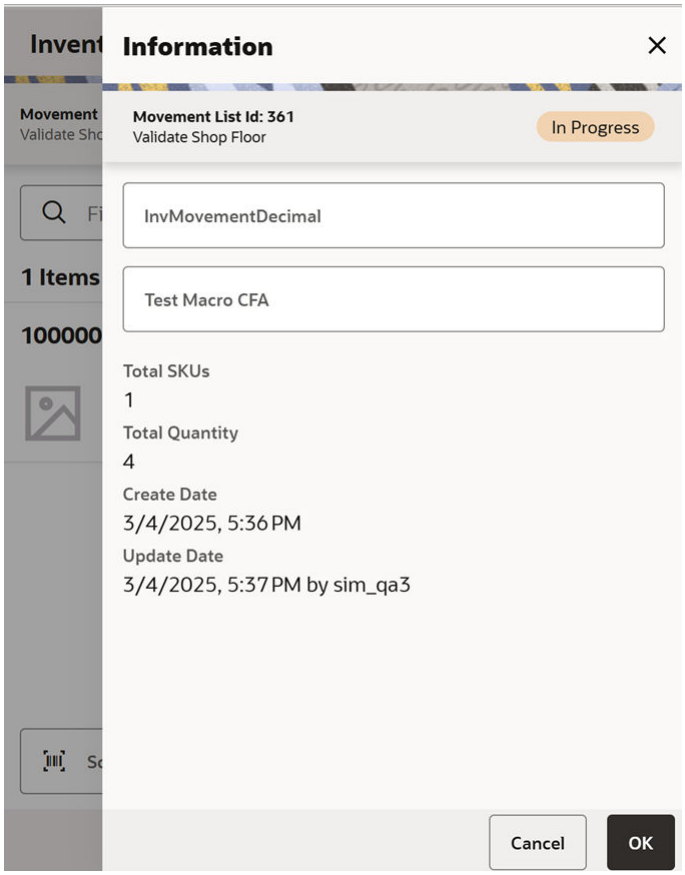
On the scan bar you can scan an item or use the standard item lookup feature to add an item to the list.

Upon confirming the list, the system performs the inventory movement based on the type you have selected and sets the list status to completed.

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Inventory Movement Info

Figure 10-36 Inventory Movement Info Screen



The Inventory Movement Info screen is accessed by selecting info option from the Inventory Movement Items screen.

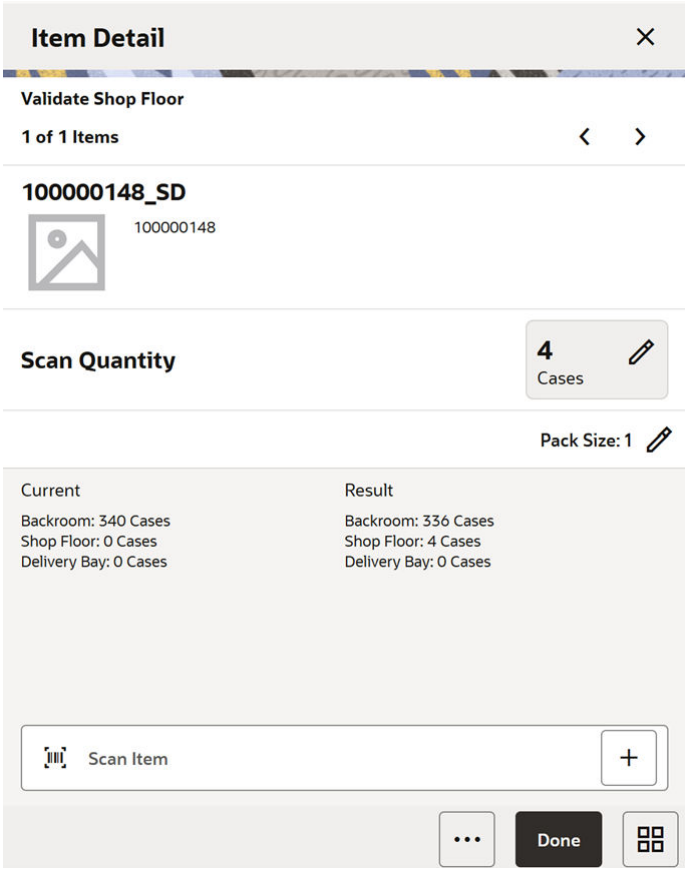
This screen provides the information about the movement which includes the Movement List Id, status, type, SKUs, total quantity, create date, update date and update user.

This screen also displays the list of CFAs (flexible attributes) that have been set up for Inventory Movement in the system and allows you to capture values for them. The fields displayed here are based on what is setup for the Inventory Movement. The CFAs that are set up as 'Required' must have a value entered for it before confirming the scan list. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the mobile application. Appropriate security permission is needed, and the pick list record must be in editable state for entering CFA values.

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Inventory Movement Item Detail

Figure 10-37 Inventory Movement Item Detail Screen



You are directed to the Item Detail screen upon selecting an item or when you scan or enter an item on the Inventory Movement Items screen.

User may also scan the same item or a different item from this screen. The information will be retained for the movement you are currently working in, until you leave. Select **Save and Exit** from the Inventory Movement items screen to permanently save the item information. There is no Save on the Item Detail screen.

Editable fields are displayed at the top with pencil icons and non-editable information fields are grouped at the bottom of the pane.

On the item detail screen, you will be able to see the current inventory position and the results after the inventory movement.

Scanning or entering an item on this screen will refresh this screen for the item scanned/ entered. At the bottom of the screen the details of the last scanned barcode will be displayed.

The screen will be in edit mode when it is in the New status.

You need permission to edit the scan quantity using the edit pencil icon.

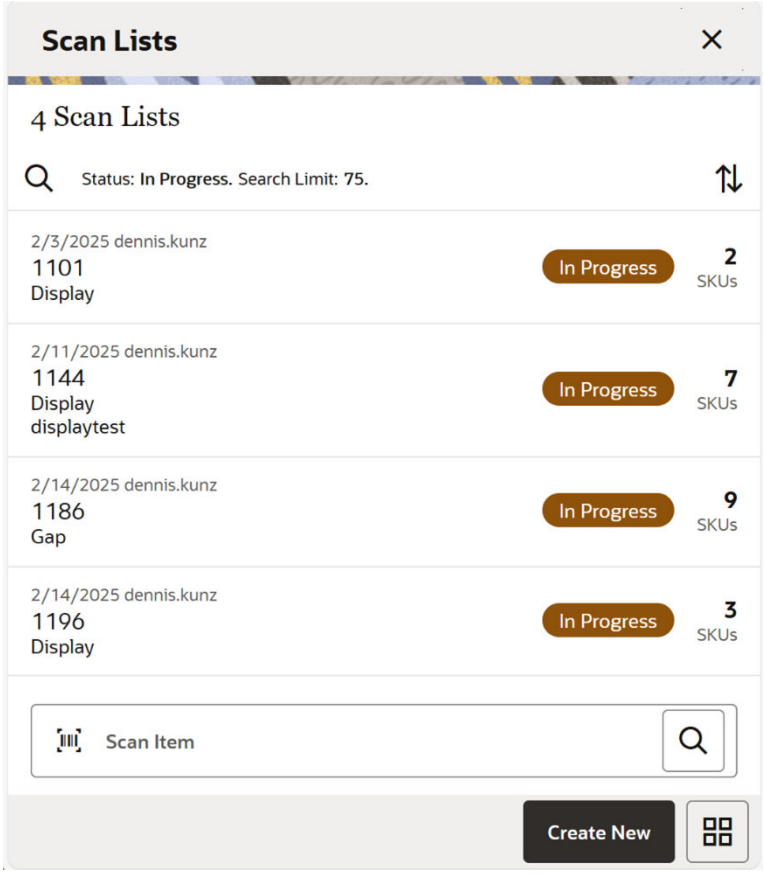
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Scan List

- Scan List
- Scan List Items

Scan List

Figure 10-38 Scan List



You can access the Scan List by selecting the Scan List option from the In Store Replenishment menu available on the drawer menu or from the Quick Actions.

You must have proper permissions to access this screen.

The list displays all types of Scan List viz Display, Gap, Other and Store Runner types.

You can create a new scan list by selecting the **Create New** button and the system will take you to the Scan List Items screen for adding the items.

When you select the Create New option, the system automatically assigns the scan list type based on the Default Scan List Type store parameter and takes you to the Scan List Items screen with the empty list.

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> **Note**
>
> If you do not have data permission to the default type set, you will not be able to create a new scan list.

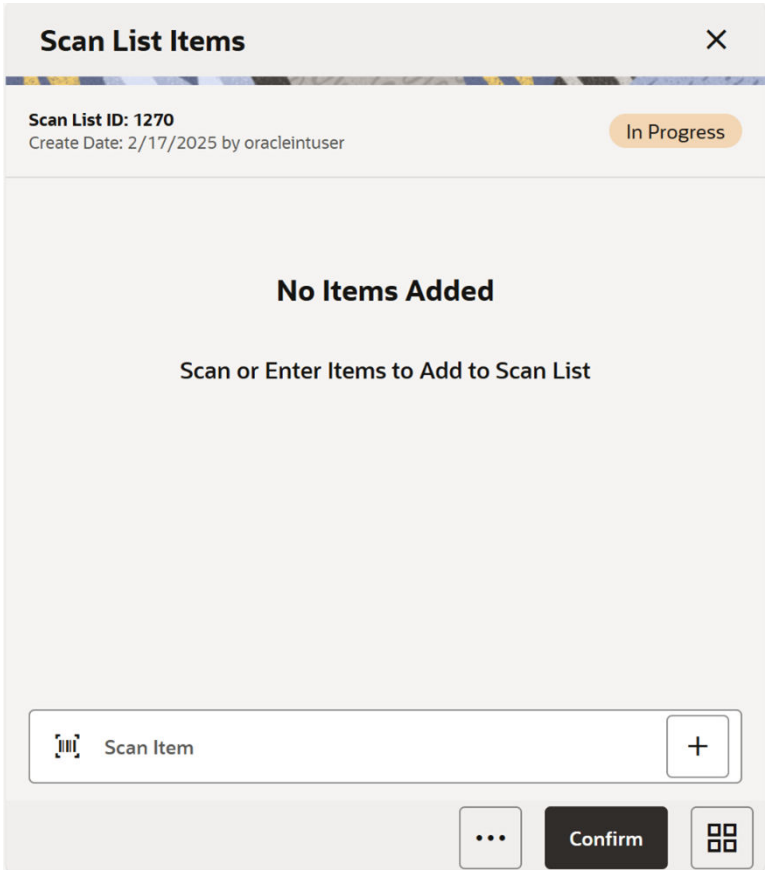
If you are selecting the scan list record from the list, the system will take you to the Scan List Items screen with the items listed.

You can filter the scan list records using the search criteria screen by selecting the magnifying glass and applying the search criteria. The search criteria screen allows you to enter various fields and filter the scan lists records.

The screen provides the header level information of each scan list such as Id, status of the scan list, type, and the total SKUs.

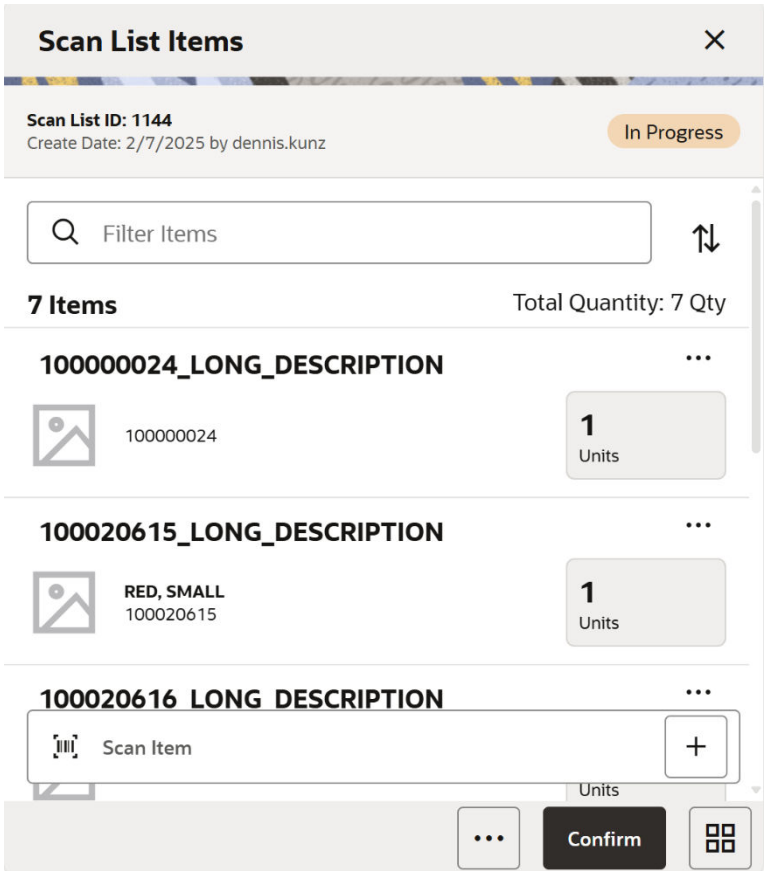
Scan List Items

Figure 10-39 Scan List Items Screen



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Figure 10-40 Scan List Items Screen



You can access the Scan List Items screen by selecting a scan list from the Scan List screen or when creating a new scan list by selecting the Create New button on the Scan List screen. You will also land on this screen when selecting a scan list record from the Open transactions screen.

When creating a new scan list, this screen will show empty and allow you to scan the items to add it to the scan list. When you enter this screen, the system automatically assigns the type based on the Default Scan list type store parameter and if you want to change, you can use the information screen.

This screen displays the list of items that are in the scan list.

At each item level, the system displays the Image depending on the user preference, Item Id, Description, Scan quantity, UOM and Pack Size.

Selecting a line item navigates to the item details of that item. Scanning or entering an item in the scan bar will navigate the user per the User Preference, Scan Navigate. The user will either go to the Item Detail for the item or stay on the Scan List Items screen. Quantity may or may not be incremented/decremented for the item on the list upon scan. This is dependent on the Scan Mode and the barcode embedded quantity.

By selecting the delete from the item level overflow menu(ellipsis) when in edit mode you can flag the item to be deleted. You must have Edit permission to remove items.

When you confirm the scan list, the system will save the changes and status will move to completed. If the type selected is Gap or Display, the system will take you to the create replenishment pick screen to create a pick.

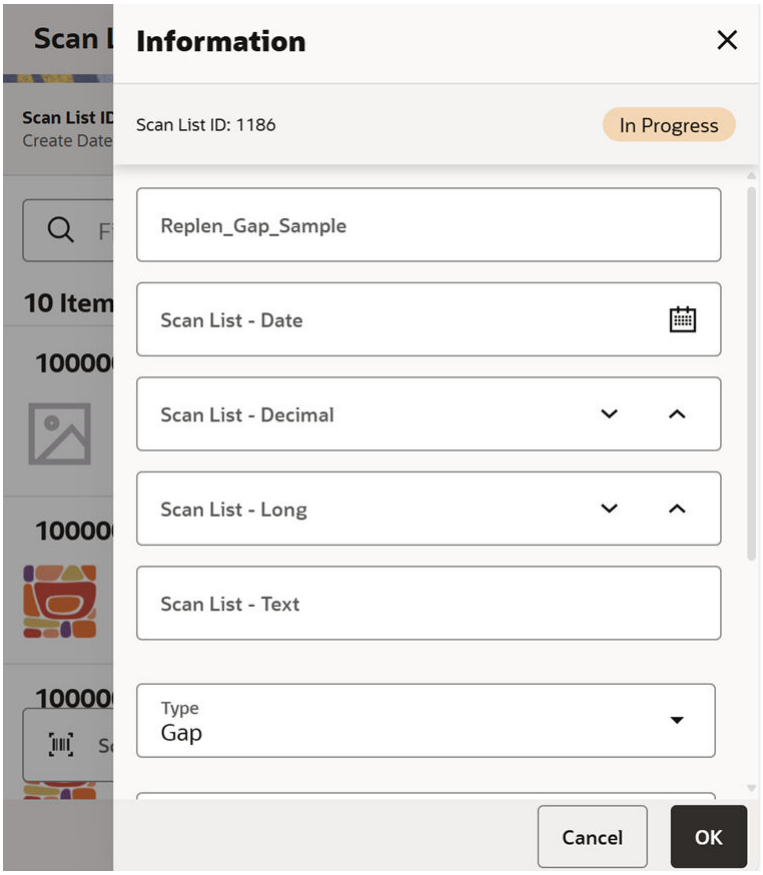
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From the footer menu you can access the Info, Notes, Delete, Save and Exit and Print.

UINs and Extended Attributes are not captured in Item Scan List.

Scan List Info

Figure 10-41 Scan List Items Info Screen



The Scan List Info screen can be accessed by selecting the Info option from the footer menu on the Scan List Items screen.

This screen provides the information about the scan list which includes the Scan List Id, status of the scan list, type of the scan list, SKUs, total quantity, create date, last update date and user.

On this screen, you can change the type of the scan list and provide a description to the scan list optionally.

- Display Scan:

  This list is intended for you to scan the shop floor display items. The list of scanned items will be compared when generating a pick list.

- Gap Scan:

  For Gap Scanning, you will scan gaps on the shelf. When the list is complete, you can save it and have it executed.

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- Other:

  This list is intended for Retailer’s custom use.

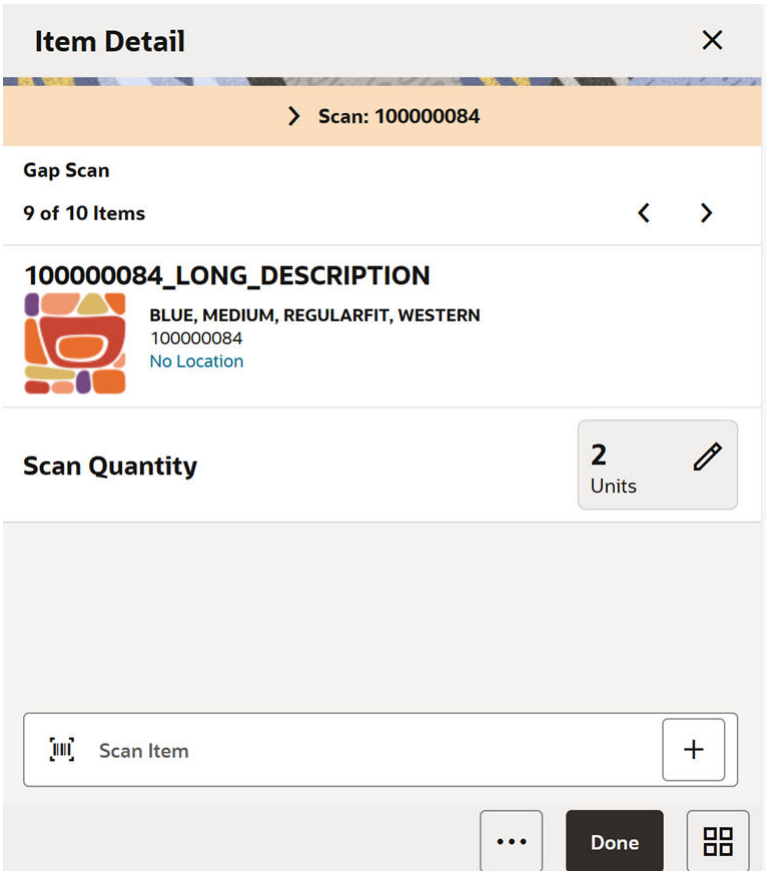
- Store Runner:

  This list is intended for the Store Runner use. The list created under this type is listed on the Store Runner List for the user to process the inventory request from shop floor.

This screen also displays the list of CFAs (flexible attributes) that have been set up for Scan List in the system and allows you to capture values for them. The fields displayed here are based on what is setup for the Scan List. The CFAs that are set up as 'Required' must have a value entered for it before confirming the scan list. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the mobile application. Appropriate security permission is needed, and the scan list record must be in editable state for entering CFA values.

Scan List Item Detail

Figure 10-42 Scan List Item Detail



The scan list item detail screen can be accessed from the scan list items screen when selecting an item or when entering/scanning a new item to the list.

You may also scan the same item or a different item from this screen. The information will be retained for the item scan list you are currently working in, until you leave the transaction. At the top of the screen the details of the last scanned barcode will be displayed.

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Select **Save and Exit** from the Scan List Items screen to permanently save the item information. There is no Save on the Item Detail screen.

For this screen to be in edit mode, you must have proper permissions.

This screen will be in view only mode if the status of the scan list is completed.

You can use the arrow buttons on the top to navigate items.

You can access the footer menu by selecting the ellipsis button on the bottom and add item to the item basket or remove the item from the item basket and print the ticket.

You can select the Delete option from the footer menu to delete the item from the scan list.

You can use the pencil icon and edit the scan quantity of the item.

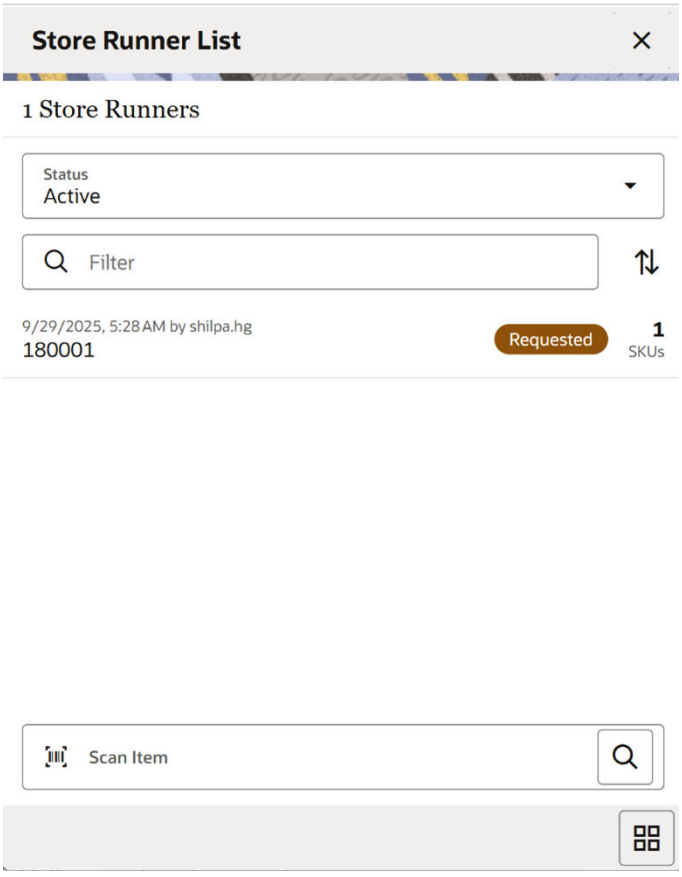
When you select Done, the system takes you to the Scan List Items to Save or confirm.

Store Runner

- Store Runner List
- Store Runner Items

Store Runner List

Figure 10-43 Store Runner List



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The Store Runner dialog helps you to exercise the stock request done by the sales person or staff on the shop floor to the backroom to meet customer demand or to replenish. Typically a request is sent to the backroom and a store runner staff is sent to the backroom to bring the items to the shop floor.

The requesting process is handled in the Scan List by creating the scan list of type Store Runner.

In this dialog the user can exercise the request by sending the inventory or rejecting the request.

You can access the Store Runner List by selecting the Store Runner option from the In Store Replenishment menu available on the drawer menu or from the Quick Actions.

You must have proper permissions to access this screen.

When you access this screen, the system will by default list all the active Store Runners and you can select the one from the list to pick or reject the request.

You can filter the store runner list records using the status drop down. You can select All, Active or Closed to refine the list.

On this screen you can also filter the list using the standard text filter and also use the sort option to sort the records.

If you scan an item on the scan bar, the system searches the store runners containing the scanned item and will list those.

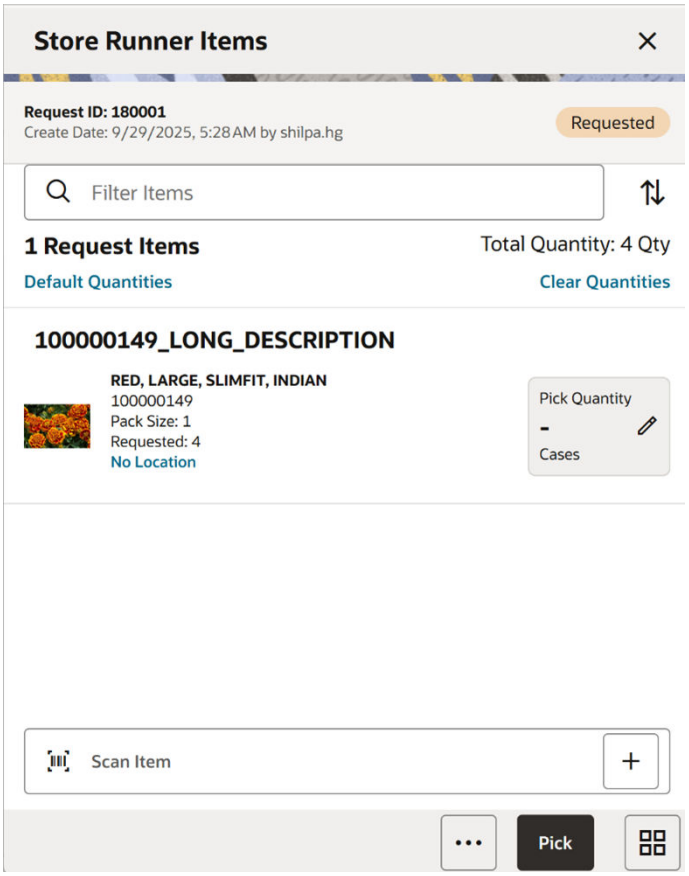
You can find the header level information such as request id, date, user, status and the number of SKUS.

If you are selecting the scan list record from the list, the system will take you to the Store Runner Items screen with the items listed.

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Store Runner Items

Figure 10-44 Store Runner Items



You can access the Store Runner Items screen by selecting a Store Runner from the Store Runner List.

This screen will list all the items that are in the selected store runner.

On this screen you can pick the shop floor requested items by scanning the item or entering the picked quantity against the requested item using the quantity editor.

On the header you can use the filter option to refine the list or use the default quantities to default the pick values with the requested quantity. Selecting clear quantities will reset the values.

You can also find the header level information such as request id, date, user status, number of request items and the total quantity.

There is no item detail in this dialog.

After scanning or entering the quantities, you can select the Pick option to send the inventory to the shop floor.

When you select Pick, the inventory is moved to the shop floor either from the backroom or from the delivery bay. The system will first move the inventory from the backroom, and if not

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available in the backroom and if delivery bay is enabled and stock available, the system will move the inventory from the delivery bay.

If you want to reject the complete request, you can select the Reject option from the footer menu.

Other options from the footer menu you can access are Notes, Print, Cancel and Pick.

Two notifications have been added for the store Runner Functionality to notify the creator or executor of the store runner list:

1. A notification to warn users a Store Runner notification was created.
2. A notification back to the users who created a store runner record when it is completed or rejected.

Most Common Functional Process

The following table describes the most common functional processes on the mobile.

Vertical	Replenishment Method	Complexity	Use Case	Item Scan	Pick List Generate	Product Group	Likely Use Back Room/ Shop Floor	Plan-O-Gram
All	Gap Scan	Simple	- Scan items - Pick	Yes	No	No	No	No
All	Gap Scan	Medium	- Scan items - Generate pick list - Pick	Yes	Yes	No	Yes	Optional
All	Update Shop Floor	Simple	- Scan items - Complete updates to shop floor	Yes	No	No	Yes	Optional
All	Update Back Room	Simple	- Scan items - Complete updates to back room	Yes	No	No	Yes	Optional
Fashion	Fashion List	Medium	- Scan items - Generate pick list based on product group - Action pick list	Yes	Yes	Yes	Yes	No
Grocer Hard Line	Assisted Generation	High	- Set parameters - Create product group - Action within/end of day pick list - Pick	No	Yes	Yes	Yes	Yes
Fashion	Sales	Medium	- Set up product group- Action within/end of day pick list- Pick	No	Yes	Yes	No	No

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Vertical	Replenishment Method	Complexity	Use Case	Item Scan	Pick List Generate	Product Group	Likely Use Back Room/ Shop Floor	Plan-O-Gram
Fashion	Sales	Simple	- Use merch hierarchy- Action within/end of day pick list- Pick	No	Yes	No	No	No
Grocer	Receive Shop Floor	Medium	- Receive transaction - Indicates receive shop floor - Update shop floor to max capacity, move rest to back room	No	No	No	Yes	Optional
Fashion	Auto Shop Floor Update	Simple	- Set up product group - Schedule product group - End of day, auto update shop floor to capacity	No	No	Yes	Yes	No

Description of columns in preceding table:

- Vertical: Type of item vertical.
- Complexity: Difficulty of execution.
- Use Case: High-level steps.
- Item scan: Scan a list of items.
- Pick List Generate: Generate a pick list or not.
- Product Group: Is product group setup required?
- Likely use back room/shop floor quantities: does this replenishment method track inventory at the back room and shop floor or not.
- Plan-o-gram: This indicates if capacity is required to be set up. Plan-o-gram integration reduces the need to maintain this manually in our system.

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11

Stock Counts

This chapter covers stock counts. The following topics are covered:

- Overview: Introduction to stock counts (MAF Mobile)
- Functionality - MAF Mobile: Description of screens
- Functionality - JET Mobile: Description of screens

Overview

The desktop application provides the ability to schedule and authorize stock counts whereas the mobile application provides the ability to execute the stock counts.

Portions of the stock count functionality, such as the setup of product groups, schedules, and authorizations, are performed on the desktop application only. Users can configure and execute different types of stock counts such as cycle or annual counts, ad hoc counts, or counts that are based on inventory position or problems like negative stock on hand. Merchandising and individual level counting require setup and scheduling utilizing product groups, with the exception of Ad Hoc counts. The Ad Hoc count will allow you to decide which items you want to count by scanning from the shelf immediately.

Most of these counts can be scheduled to be executed repetitively on certain dates reducing the need for daily or weekly count management.

Because a variance percentage can be set, items within tolerance can, but do not have to be authorized individually.

Business Case

- **Ad Hoc Stock Count**

  A customer is looking for a blue tooth speaker in the color black. The customer finds the location on the shelf, but there are only bright pink speakers and asks a sales associate if there are any black speakers in the storage room. The sales associate looks up the inventory and the system shows there are three on hand. The sales associate looks in the backroom and cannot locate any in the store and informs the customer and reports to the store manager. The store manager instructs the sales associate to perform an ad hoc stock count to immediately correct the inventory.

- **Unit Stock Count**

  The dairy department of a grocery retailer orders milk on Tuesdays and Fridays. Before they get the order in, they are always running out of stock. The department manager decides to perform a unit count each day to determine when they are running short or if there might be some pilferage occurring.

- **Problem Line Stock Count**

  Due to ineffective receiving processes or supply chain issues, items regularly have negative stock on hand. Inventory control schedules a stock count that tracks this behavior automatically to correct such problems without having to generate manual stock count lists for each store.

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- **Unit and Amount Stock Count**

  The Store Manager is informed when it is time to financially report their store's current value of inventory. The corporate user will schedule the Unit and Amount stock count to be executed by Department and the store manager will schedule additional staff to count all items in the store. Each Department manager will be required to complete and approve their section of the stock count. When complete, the financial value will be associated with each item counted in the store and sent to the merchandising system to have it in a similar way corrected.

Types of Stock Counts

Each type of stock count can be useful for a retailer and all play an important part in the management of inventory.

Ad Hoc Stock Counts

Unlike the other stock count types, Ad Hoc stock counts are not scheduled, but rather performed at random times when a user decides to correct inventory.

Since this count type is performed randomly, there are no predefined lists and you can scan any item in any order. The scanned items can also be removed from the stock count, if needed.

You can count any inventory item even if the item has been discontinued.

The inventory snapshot is taken as each item is added to the stock count. Snapshot is a process in which the system will capture the current stock on hand quantity. For Ad Hoc counts, discrepancy thresholds are set up differently from other count types by accessing the Ad Hoc Stock Count screen.

Inventory Adjustments will be created and sent to the merchandising system when an inventory change is made in the system.

Unit Stock Counts

The unit stock count must be scheduled. They can be scheduled and executed the same day if you desire. This count type can be setup on a recurring basis: daily, weekly, monthly or yearly.

The items to include in the stock count are identified by setting up a product group. The product groups are a one-time setup and can be reused for future stock counts. Product groups are used for creating the list of items as well as identifying how the stock count is processed. When setting up the stock count, you can define which items to include by selecting by All department, item, supplier, style, item basket, or merchandise hierarchy level. There are various settings used to determine how an item will be identified as being discrepant.

Unit counts are the only stock count type that allows you to select any item status to include in the count. You can also select whether to include items that do not have any stock on hand.

Inventory Adjustments are created and sent to the Merchandising System for any inventory adjustments made.

Problem Line Stock Counts

The problem line stock count is setup once and scheduled to run daily for a period of time. If there are no problem items, a stock count will not be created. Setup of the stock count can be done at the all department, item, supplier, style, item basket, or merchandise hierarchy level.

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Each day, the system will run the problem batch and find any problem items and populates those items on a stock count. Discrepancy Thresholds are defined the same as the Unit count, but there are additional criteria defined during Product Group Setup. The additional information you can select for the problem line counts includes, Actual Pick Amount less than Suggested Pick Amount and negative available inventory and UIN Discrepancies (Unique Identification Numbers).

Problem line stock counts follow exactly the same workflow as unit counts. The only exception is the product group setup.

Unit and Amount Stock Counts

The Unit and Amount stock counts must be scheduled for a specific date. These stock counts, need to be scheduled at least 1 day ahead of time. When the count is scheduled it is sent to the merchandising system so that it can also create a corresponding stock count.

Item lists are created by merchandise hierarchy or can include all departments. Unit and Amount counts cannot select by item, supplier, style, or item basket, because the merchandising system holds the valuation at the merchandise hierarchy level. Unexpected items can be added during the counting process so long as they are for the same merchandise hierarchy that the stock count was set up for.

The item status and SOH Quantity cannot be selected and are defined by the system. Inventory is updated in the system and a flat file is created with the new SOH quantity, rather than the delta. The file will be sent out externally for other systems such as merchandising.

Summary

The following figure shows a summary of the similarities and differences between the various types of stock counts.

Figure 11-1 Summary of Types of Stock Counts

	Use Pre-defined Item list	Must be initiated on the mobile app	Schedule Stock Count	Take Snapshot as each item is counted	Take Snapshot during count, through UI	Take Snapshot through batch	Take Recount snapshot	Guided Counting Method	Unguided Counting Method	Third Party Counting Method	Flexible Counting Method	Schedule Weekly, Monthly, Yearly	Schedule Daily	Can Use Merchandise Hierarchy	Sends Delta Inventory Adjustments	Sends Flat File	Re-Count Process
Adhoc		X		X					X						X		
Problem Line	X		X		X		X	X	X	X			X	X	X		X
Unit	X		X		X		X	X	X	X	X	X	X	X	X		X
Unit and Amount	X		X			X		X	X	X	X		X	X		X	X

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Unit, Problem Line, Unit and Amount stock counts all use predefined item lists and must be scheduled. Ad Hoc stock counts do not use a predefined item list, and are not scheduled. The snapshot for Unit, Problem Line and Unit & Amount stock counts is taken for all items on the count at the same time, while the Ad Hoc stock count takes the snapshot as each item is counted. The snapshot for Unit and Problem Line should be taken before counting the first item and can be done through the UI. However, for Unit and Amount, the snapshot should be taken via a batch and can be taken any time until the stock count is completed. Only the Unit and Problem Line allow the snapshot to be retaken during the recount.

Ad Hoc stock counts never use guided counting and as a result files cannot be imported from a Third Party service. Only the Unit stock count can be scheduled on a recurring basis. The Problem Line can only be scheduled daily and Unit and Amount scheduled for a specific date.

Since the Ad Hoc stock count is not defined using product groups, it is the only type of count that does not have a recounting stage.

Counting Methods

The counting process is identical among Unit, Unit and Amount, and Problem Line stock count types. What differs among these three stock count types is either the setup or the items being counted.

SIOCS includes the following types of counting methods for stock counts:

- **Un-guided**

  The Unguided count method allows the user to scan any item in any order. When the system parameter 'Unguided Stock Count Allow Multiple Users' is set to 'Yes', an unguided stock count will allow more than one user to scan simultaneously against the same stock count.

- **Guided**

  In Guided count method, the items are counted based on locations

- **Third Party**

  Here, the stock count will be done by a third party service provider and the result file will be uploaded into the system for further processing

- **Flexible**
  - Applicable only for Unit and Unit and Amount stock counts
  - Enables the retailers to create adhoc locations on the go based on the physical distribution of items at the store and start counting
  - Available in JET mobile only

Serialization

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

The system provides the capability to track items by unique identification numbers (UIN). If the system is not configured to use UINs, this does not apply. If the UINs are not used, fields and functions related to UINs are not available in the mobile application UI.

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If UINs are required for an item, the UINs must be scanned, entered or automatically generated when stock is received. When UINs are generated for tracking items, users can print labels with the generated UINs.

If the store uses UINs, the snapshot captures the status of those items in the store as part of the store's stock on hand, as well as those UINs in missing status.

Functionality - MAF Mobile

This section covers the available screens.

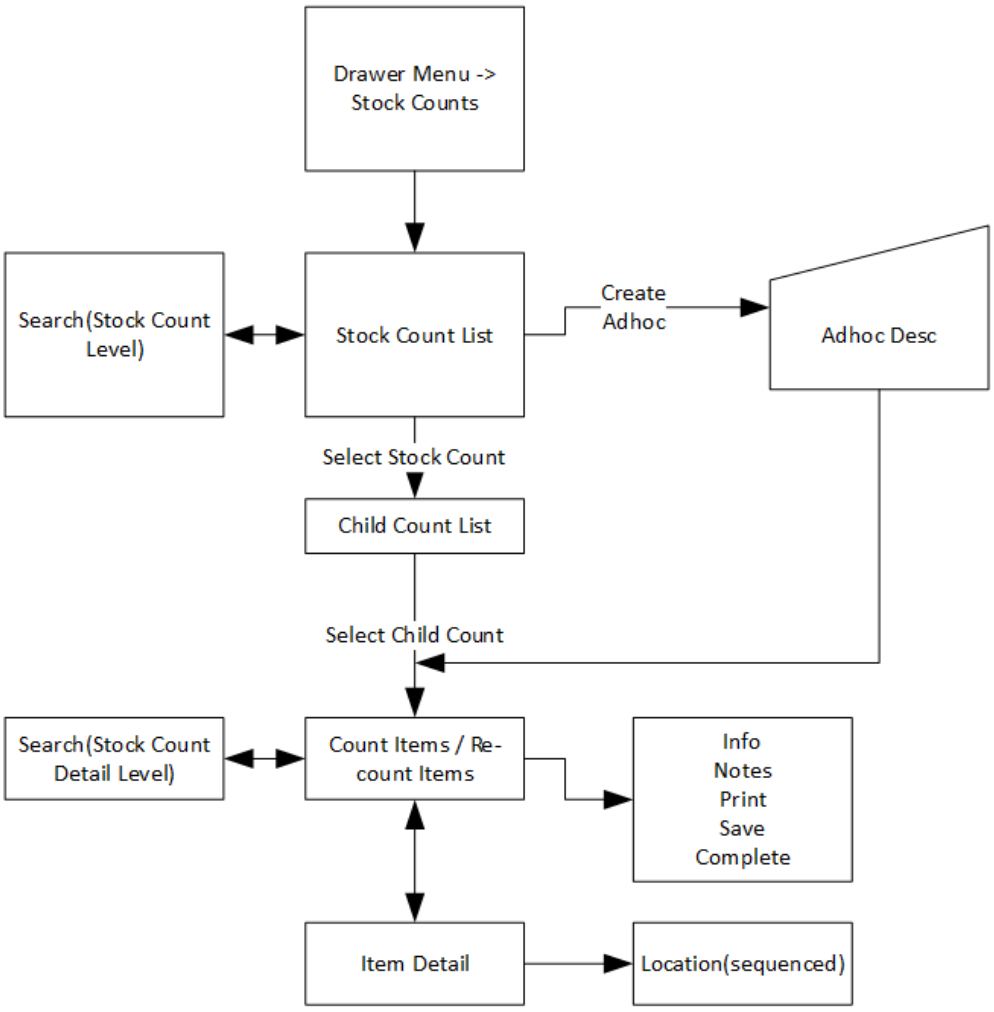
Features

The following is a list of features for Stock Counts in the mobile application:

- Search for stock count
- Create a new AdHoc stock count
- View or edit an existing stock count
- Count items for stock count
- Count items through bulk scanning
- UIN

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Figure 11-2 Stock Count Mobile Screen Flow (MAF)



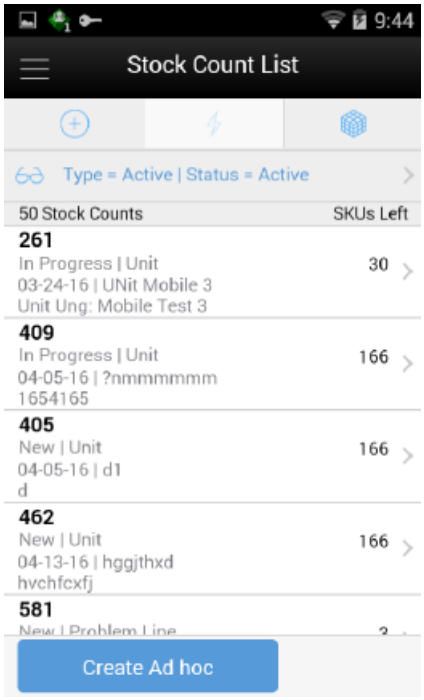
After logging into the mobile application, the main menu drawer is displayed. You can select Stock Counts from the Inventory Management menu (or - in JET mobile only - from Quick Actions; see separate chapter "Functionality - JET Mobile" below).

The Stock Counts module in the mobile application contains Stock Count List, Creating a new Ad hoc Stock count, Child Stock Count List and viewing the item details.

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Stock Count List

Figure 11-3 Stock Count List Screen



You can select Stock Count from the Main Menu Drawer and be directed to the Stock Count List screen. You will need permissions to access this screen. When you enters the screen, the system will default to display records with a status of "Active" and type of "Active."

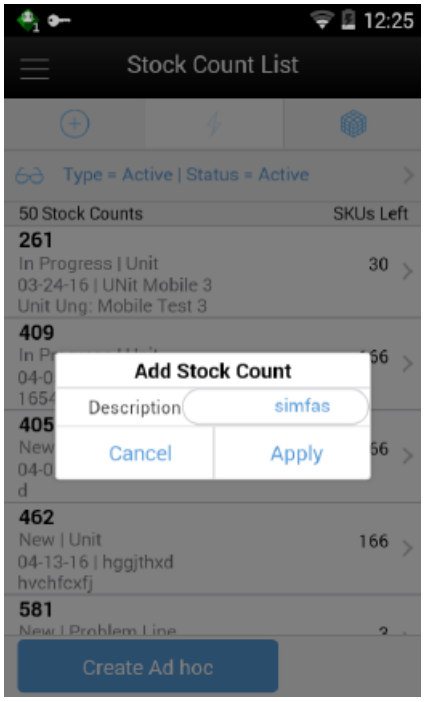
The transactions may include Ad hoc stock count, Unit count, Problem Line count, and Unit and Amount count:

- You are required to have the Edit Adhoc Stock Count permission to edit an Adhoc stock count.
- You are required to have the Edit Unit Stock Count permission to edit a Unit stock count.
- You are required to have the Edit Unit Amount Stock Count permission to edit a Unit and Amount stock count.

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Ad Hoc Stock Count

Figure 11-4 Add Stock Count Popup



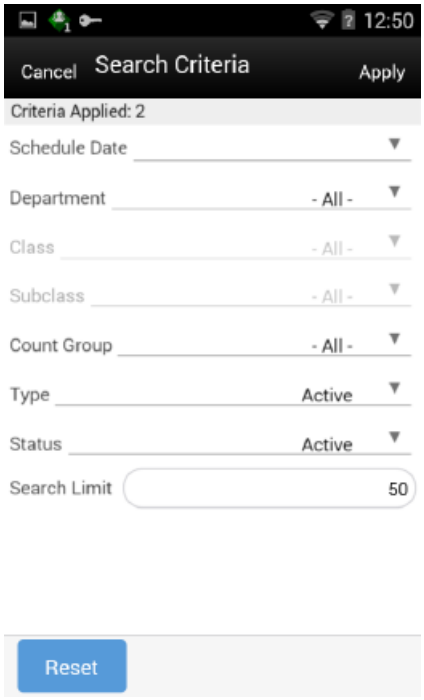
You can select **Create Ad Hoc** from Stock Count List and be directed to the **Add Stock Count** popup to add a description for an adhoc stock count. You will need permissions to access this screen. When you enter the screen, the text box for entering description for Ad Hoc stock count is filled with highlighted <user ID> which, once written with text, goes off. After entering the description, the user can add items to the stock count and complete the count.

If needed, the retailers can create an adhoc stock count and yet not give the opportunity for an associate to continue adding items, basically, the stock count will be locked after adding the first set of items. This option of locking a stock count will be enabled when the system parameter **Enable Adhoc Stock Count Locking** is set to **Yes**. If this parameter is set to **Yes**, there will be new flag called **Adhoc Stock Count Lock** which comes into picture. If the user adds items via bulk scan or through an item basket, this flag is set to **Yes** automatically and additional items cannot be added henceforth. It can be edited from the **Edit Stock Count** screen as well, provided the user has appropriate permissions.

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Stock Count List Search Criteria

Figure 11-5 Search Criteria Screen



You can select the eye glasses from the stock count list screen and be directed to the **Search Criteria** screen. When you enter the screen, the mobile application will default to display records with a status of **Active** and type of Active.

Fields

Criteria Applied <x>: The number of criteria applied to the search, where X is the number.

Scheduled Date: The date for which the scheduled stock count is scheduled. Defaults to blank.

Department: List of values containing all of the departments. The value will be defaulted to All. Since a Product Group can consist of more than one merchandise hierarchy, the filter will return all stock counts that are affiliated with the department or where the counting groups contains that hierarchy. When a department is cleared out, the class and sub-class will also be cleared out.

Class: List of values containing all of the classes for the selected department. You must select a department first for the class to be editable. The value will be defaulted to All. Since a Product Group can consist of more than one merchandise hierarchy, the filter will return all stock counts that are affiliated with the class and counting groups that contain that hierarchy. When a class is cleared out, the subclass will also be cleared out.

Sub-Class: List of values containing all of the sub-classes for the selected class. You must select a class first for the class to be editable. The value will be defaulted to All. Since a Product Group can consist of more than one merchandise hierarchy, the filter will return all stock counts affiliated with that subclass and counting groups that contain that hierarchy.

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Count Group: List of all product groups that exists in the system. Defaults to All.

Type: List of values. Valid values are Stock Count, Re-Count, Authorize, Active, and All. Default value is Active. Active is a type represents Stock Count and Recount (not Authorize).

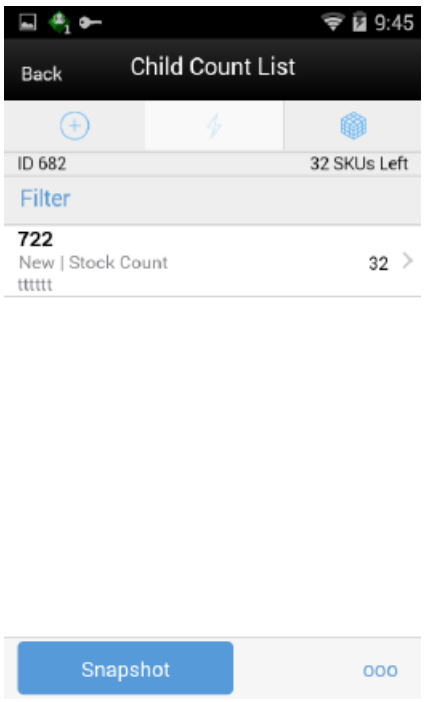
Status: valid values are New, In Progress, Processing, Completed, All, and Active. Default value is Active. Active will include New and In Progress stock counts.

> **Note**
>
> Confirmed is the status of a guided Unit and Amount stock count for all items that are in Authorize Type and have not yet moved to Completed due to not having the results exported. Once exported, the stock count will move to Completed status. If user selects a stock count in confirmed or completed status it will be in view only mode.

Search Limit: Entry field. You can define a search limit for the number of transactions being displayed. It is a Required Field. The value will default through a system admin setting, Search Limit Default for stock count list - Mobile.

Child Count List

Figure 11-6 Child Count List Screen



You can select **Stock Count** from the Stock Count List and be directed to the **Child Count List** screen. When you enter the screen, the system will sort the child count by ID. Closed child count should be at the bottom and Active child counts should be at the top and then this ID sorting should be applied.

Selecting a child count will take you to the Stock Count Items and Stock Re-Count Items screen. Ad hoc Stock Counts will automatically have a single child count created. (Ad hoc

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stock counts will have one stock count to one child). The child count will be automatically named the same as the stock count (assigned description by user) with the words (child) after it.

Snapshot: This will take snapshot for all the child counts on the stock count. This will take a snapshot for Problem line and Unit type of stock counts only. If any other type of stock count, this button will not be visible.

The snapshot of a stock count will happen as follows:

- **Unit or Problem Line**: Can be taken from Child count list screen for the whole stock count or from the Stock count item screen if not in re-count mode. For Re-Count, it will be taken automatically.
- **Adhoc**: Takes snapshot as items are added.
- **Unit and Amount**: Snapshot for this type can be taken via the Snapshot batch within the desktop application.
  - For unexpected items that get added during counting:
    * If the snapshot has already been taken for the count, it will take the snapshot of the unexpected item as it gets added to the count.
    * If the snapshot has not been taken for the count yet, then the snapshot for the unexpected item will not get taken as the item is added, rather when the snapshot is taken for the stock count.

You can access the Child Count List screen by creating an Adhoc stock count or selecting a stock count from the Stock Count List screen.

You must have the Edit Adhoc Stock Count permission to open the screen in edit mode when displaying an Adhoc count; otherwise the screen will open as view only.

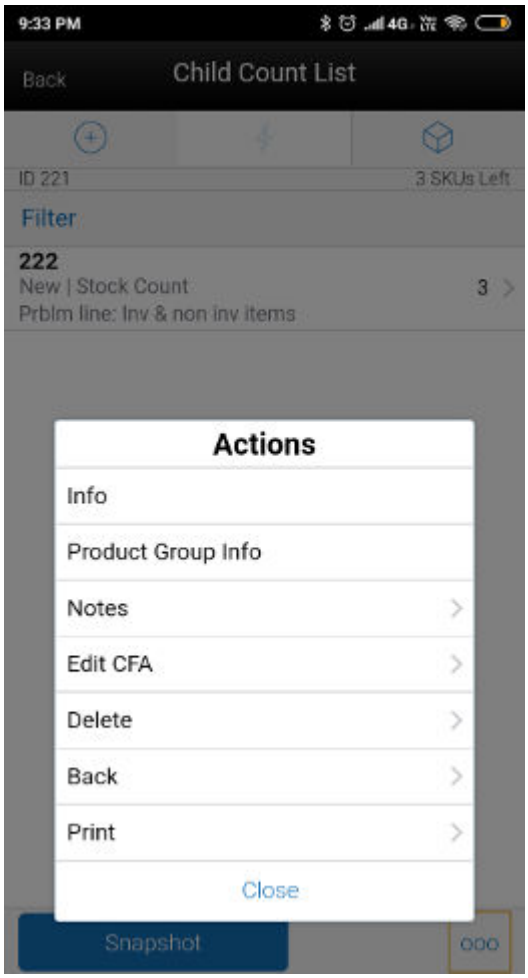
Similar to a unit count, you must have the Edit Unit Stock Count permission to open the screen in edit mode when displaying a Unit count; otherwise, the screen will open as view only.

You must have the Edit Unit and Amount Stock Count permission to open the screen in edit mode when displaying a Unit and Amount count; otherwise the screen will open as view only.

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Footer Menu

Figure 11-7 Child Count List Footer Menu



This opens up a footer menu with following options:

Info: Info popup will be displayed.

Product Group Info: Product Group Info popup will be displayed.

Notes: Notes dialog will be displayed.

Edit CFAs: This will navigate you to the Edit CFAs screen to capture the Custom Flexible attributes for the stock count/recount.

Print: This will open the print dialogue.

Back: This will navigate you back to the Stock Count List screen.

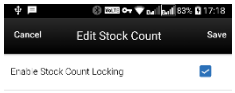
Delete: This will delete the Stock Count that is under consideration and have not yet been authorized.

Close: This will navigate you to stock count list screen.

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Edit Stock Count

Figure 11-8 Edit Stock Count



The **Edit Stock Count** screen enables the user to set the lock which decides whether additional items can be added to an adhoc stock count or not. This screen can be accessed by selecting **Edit Stock Count** option from the footer menu of **Stock Count Child List** screen and this option will be available when the following conditions are met

1. System parameter **Enable Adhoc Stock Count Locking** must be set to **Yes**.
2. The stock count is an adhoc stock count and the status is not **Completed**.
3. The user has security permission **Edit Adhoc Stock Count Lock**.

Edit CFAs

Figure 11-9 Edit CFAs



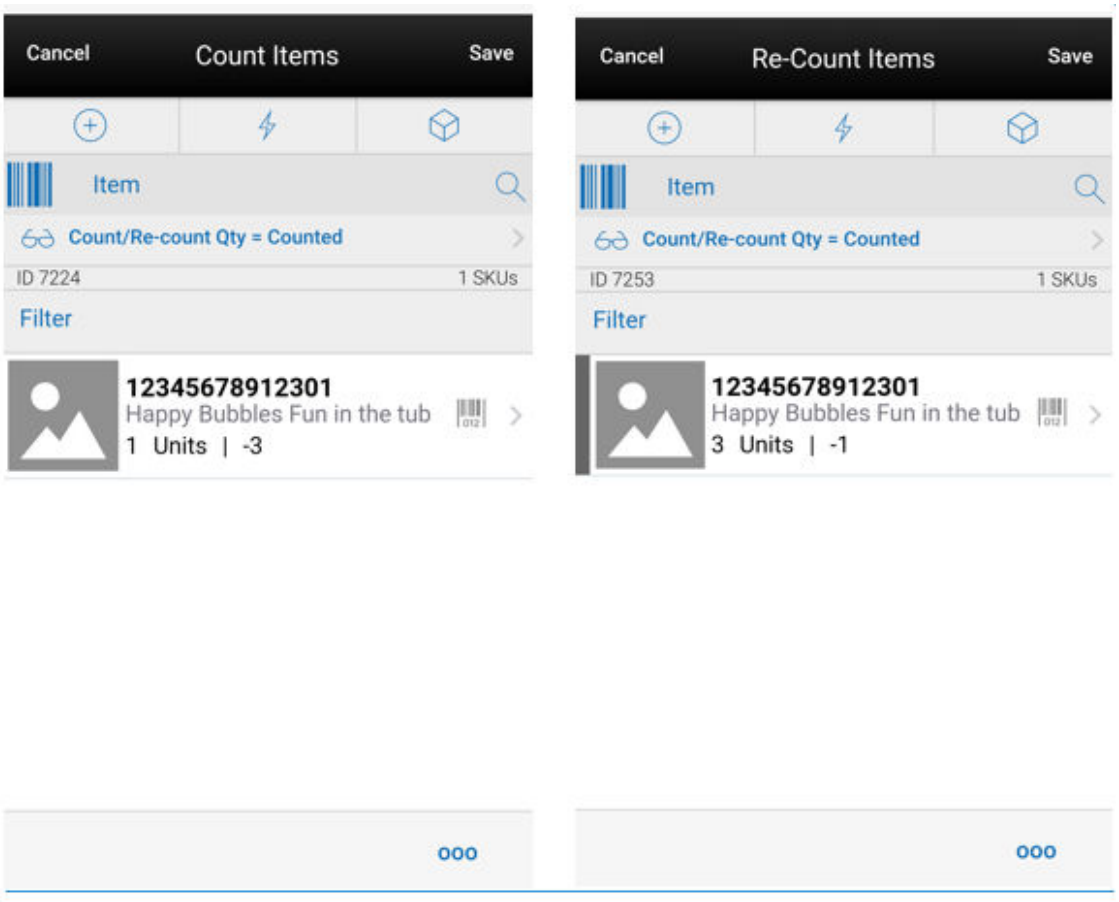
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The **Edit CFAs** screen displays the list of CFAs (flexible attributes) that have been set up for the Stock Count and Stock Recount in the system and that allows you to enter values for them.

The system displays the fields based on the setup for the type of delivery. The CFAs that are set up as **Required** must have a value entered. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permissions are needed and the count must be in editable status for entering CFA values. The CFA's captured will be displayed in the info screen.

Stock Count Items and Stock Re-Count Items

Figure 11-10 Count Items and Re-Count Items Screens



You can select a child count from the Child Count List screen and be directed to the Stock Count Items or Stock Re-Count items screen depending upon the status of the stock count. This screen appears when a child stock count is selected and the Child stock count type is Stock Count New or Stock Count In Progress. Item Images will be displayed per a system admin setting for stock counts. The system will default to show the "uncounted" records.

If the item has a UIN captured, it will have the UIN icon on the line item.

Selecting an item will go to the Item Detail for that item. If the item scanned/selected is a UIN item, the user will navigate to the UIN tab within the Item Detail screen.

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All newly added items and modified items will have a bar on left to denote those have been modified.

When you enter the screen, the system will sort the items left to count as below:

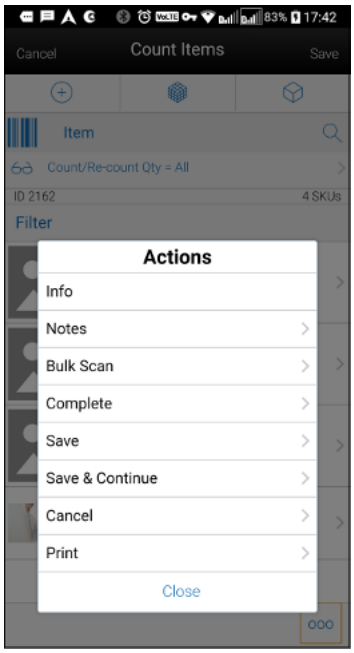
- If guided and if items are sequenced, then order by sequence order.
- If it is un-sequenced, "no location" items falling at the end by item description order.
- If unguided, items are always sorted by item description.

Variance: User will be able to view the difference between the 'snapshot' quantity and the 'Total quantity' counted, provided the user has 'View variance' security permission.

1. If the snapshot quantity < Total quantity, display '+' symbol before the variance value.
2. If the snapshot quantity > Total quantity, display '-' symbol before the variance value.
3. If the snapshot quantity = Total quantity, display '0' symbol before the variance value.
4. This field will be displayed only when the user has 'View Variance' security permission.
5. This value should be calculated dynamically after each scan (count) happens.
6. This value will be displayed only for 'counted' items.

Footer Menu

Figure 11-11 Count Items and Re-Count Items Footer Menu



Info: Info popup will be displayed.

Notes: Notes dialog will be displayed.

Bulk Scan: This will take the user to the Bulk Scan screen

Complete: This will complete the child count and navigate you to the Child Count List screen. You are required to have the Complete Stock Count permission for this menu option to display.

Save: This will save the child count and navigate you to Child count list screen.

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Save & Continue: This will save the child count and user will be in the same dialog.

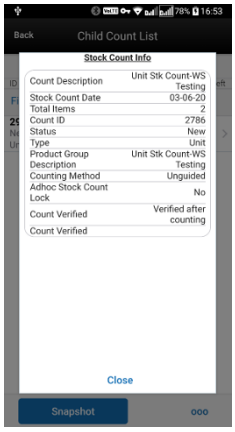
Cancel: This will discard changes to stock count / re-count and navigate you to Child count list screen. This will be "Back" when in view only mode.

Print: This will open the print dialogue.

Close: This will navigate you to Stock Count Items screen.

Info

Figure 11-12 Info Screen



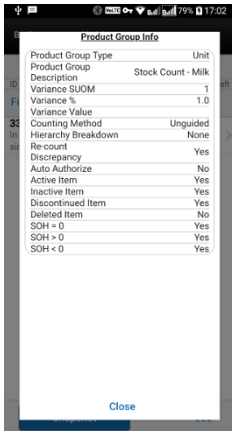
The info screen is an informational popup that contains read-only information about the header level of the stock count. It is accessed through the **Info** menu option in the Footer menu on the **Child Count List** screen. Details include:

- Count Description
- Stock count date
- Total Items
- Count ID
- Status
- Type
- Product Group Type
- Product Group Description
- Counting Method
- Adhoc Stock Count Lock - If set to yes, the field does not allow the user to add additional items to the ad hoc count
- CFAs and the corresponding value

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Product Group Info

Figure 11-13 Product Group Info Screen



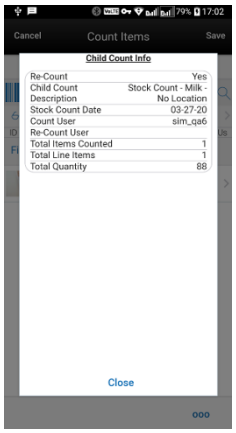
The **Product Group Info** screen is an informational popup that contains read-only information about the product group associated with the stock count. It is accessed through the **Product Group Info** menu option in the Footer menu on the **Child Count List** screen. Details include:

- Product Group Type
- Product Group Description
- Variance SUOM
- Variance %
- Variance Value
- Counting Method
- Hierarchy Breakdown
- Re-count Discrepancies
- Auto Authorize
- Active Item
- Inactive Item
- Discontinued Item
- Deleted Item
- SOH = 0
- SOH > 0
- SOH < 0
- Prob Line-Actual Pick Amt less than Suggested Pick Amt
- Prob Line-Actual Shelf Repl Amt less than Suggested Shelf Repl Amt

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Child Count Info

Figure 11-14 Child Count Info Screen



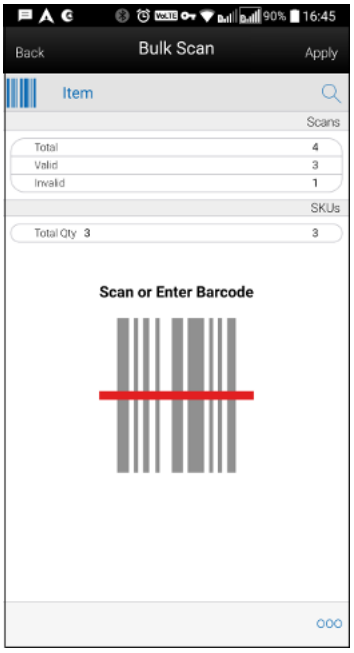
The **Child Count Info** screen is an informational popup that contains read-only information about the child count. It is accessed by selecting **Info** from the **Count Items** screen. Details include:

- Recount
- Child Count Description
- Stock Count Date
- Count User
- Re-Count User Total Items Counted
- Total Line Items
- Total Quantity

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Bulk Scan

Figure 11-15 Bulk Scan Screen



The **Bulk Scan** screen is used to scan (or enter) one or more items to apply to a transaction in Bulk.

As Items are scanned/entered, they are accumulated on this screen with just item existence validation. It acts as a "counter" and "storage" of the valid scans until they are applied to the transaction. The screen is read-only.

The user can access the **Bulk Scan** screen by:

- Selecting the **Bulk Scan** menu option from the footer menu of the Stock Count Items and Stock Re-Count Items screen. The user must have proper security permissions, **Allow Bulk Scan**, for the **Bulk Scan** menu option to be available.
- Scanning/entering items on the Stock Count Items and Stock Re-Count Items screen, when the scan type is set to **Bulk** and one or more items are scanned. The user must have proper security permissions, **Allow Bulk Scan**, for the **Bulk Scan** type option to be available.

Footer Menu

Items: The user will be taken to the Bulk Items screen to view the items from the scan(s)

Import Basket: You will be taken to the Select Item Basket screen to select an item basket to import. User must have **Import Item Basket** permission for the respective functional area for this menu option to be available within a functional area. Only 'static' item baskets can be imported.

Apply: This will take all of the items found (valid scans) from the scan(s)/entries on the screen and validate them against the transaction. Any issues will be gathered to display on the Issues screen.

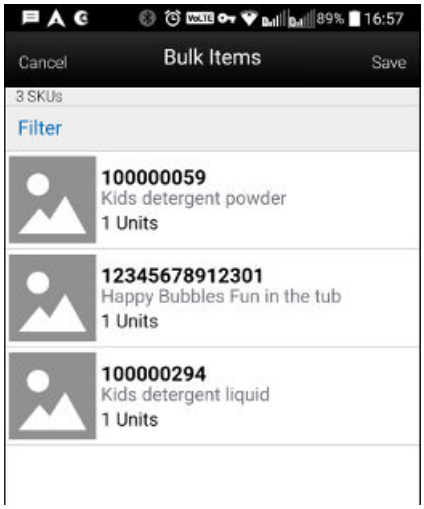
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Clear: This will clear out anything that has been scanned/entered. All counters will reset back to 0.

Back: The user will navigate back to Stock Count Items and Stock Re-Count Items screen and the system will auto save the items scanned/entered.

Bulk Items

Figure 11-16 Bulk Items Screen



The **Bulk Items** screen displays all of the items that are affiliated with the items collected on the Bulk Scan screen. All scans that were valid/successful, meaning that they found an item in the system, will be displayed on this screen.

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Issues

Figure 11-17 Issues Screen



This screen displays all of the Issues (alerts, warnings and errors) associated to the items that were scanned/entered on the Bulk Scan screen from Item Detail and Stock Count Items and Stock Re-Count Items screen.

Footer Menu

Yes to All: All warnings will be set to 'checked'/'yes'.

No to All: All warnings will be set to 'unchecked'/'no'.

Confirm: The system will apply the item(s) to the transaction that had no and those with issues based on the decisions taken by the user. If the item does not exist on the transaction yet, the item and quantities will be added to the transaction. If the item does exist on the transaction, the quantity will be added. All items that have only Alerts and all items that have only Warnings that were selected as 'Yes' will be applied to the stock count.

Cancel: Exits the screen and nothing is saved.

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Issue Detail

Figure 11-18 Issue Detail Screen



This screen displays all of the items that are associated with a specific issue (Alert, Warning, or Error). The user can access the Issue Detail Screen by selecting an issue (Alert, Warning, or Error) from the Issues screen.

Footer Menu

Yes to All: All warnings will be set to 'checked'/'yes'.

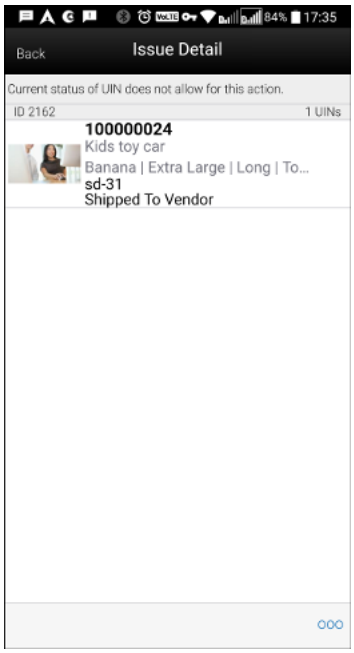
No to All: All warnings will be set to 'unchecked'/'no'.

Cancel: This will take the user back to the Issues screen.

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Issue Detail - UIN

Figure 11-19 Issue Detail UIN Screen



This is the **Issues Detail** screen for UINs. The screen displays all of the UINs that are associated with a specific issue (Alert, Warning, or Error), along with the item it belongs to. The user can access the **Issue Detail** screen by selecting an issue (Alert, Warning, or Error), from the Issues screen, which is of UINs.

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Issues - Single Item

Figure 11-20 Issues - Single Item Screen



This is the **Issues - Single Item** screen which displays all of the issues (Alert, Warning, or Error) for an item scanned via regular scan. The screen is displayed when the user scans a single item in Auto/UIN scan type mode and if the item failed any validations.

Footer Menu

Apply: This button is displayed if there are warnings and alerts only. This lets the user to go ahead with the warning displayed and add the item to the transaction. After selecting 'Apply', the required action will take place depending on the requirements of the warning displayed.

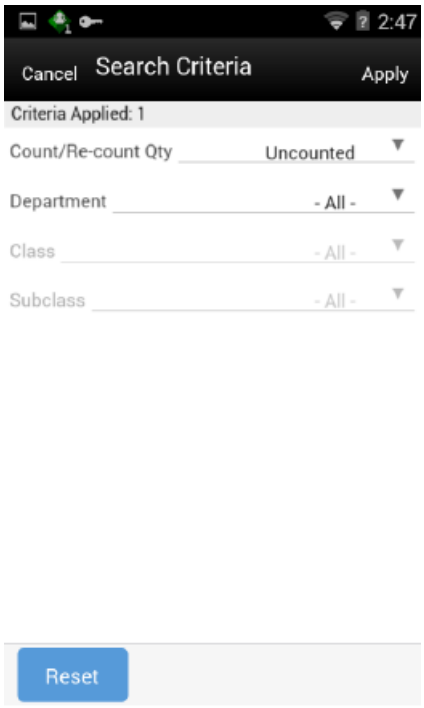
Cancel: This button is displayed if there are warnings and alerts only. This allows the user to stop adding the item to the transaction. After selecting this button, the required action will take place depending on the requirements of the warning displayed.

OK: This button is displayed if there are errors and/or alerts only. By clicking 'OK', the user can acknowledge the error/alert.

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Search Criteria - Stock Count Items and Stock Re-Count Items

Figure 11-21 Search Criteria Screen



You can select the eye glasses from the Stock Count Items and Stock Re-Count Items screen and be directed to the Search criteria screen.

The default will be:

Stock Count: Count / Re-Count Qty = 'uncounted'

Re-Count: Count / Re-Count Qty = 'uncounted', Filter = 'Discrepant'

The Count / Re-Count Qty will default as the filter on the top of the Stock Count / Stock Re-Count screen.

Fields

Criteria Applied <x>: - the number of criteria applied to the search, where X is the number.

Count / Re-Count Qty: Valid values are All, Counted and Uncounted.

Filter: Valid values are All Items and Discrepant Items. Displays only when it is a Re-Count.

Department: List of values containing all of the departments pertaining to that stock count. The value will be defaulted to All. Since a Product Group can consist of more than one merchandise hierarchy, the filter will return all stock counts that are affiliated with the dept or where the counting groups contains that hierarchy. When a department is cleared out, the class and sub-class will also be cleared out.

Class: List of values containing all of the classes for the selected Department. User must select a department first for the class to be editable. The value will be defaulted to All. Since a Product Group can consist of more than one merchandise hierarchy, the filter will return all

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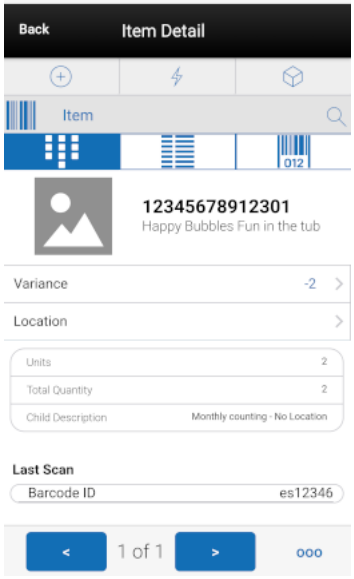
stock counts that are affiliated with the class and counting groups that contain that hierarchy. When a class is cleared out, the subclass will also be cleared out.

Sub-Class: List of values containing all of the sub-classes for the selected Class. You must select a Class first for the sub-class to be editable; the value will be defaulted to All. Since a Product Group can consist of more than one merchandise hierarchy, the filter will return all stock counts affiliated with that subclass and counting groups that contain that hierarchy.

Reset: Button will clear the screen of any previous search criteria that was entered by you and set back to the default values. The screen will remain open for you to enter in new search criteria.

Item Detail

Figure 11-22 Item Detail Screen



The **Item Detail** screen is displayed when selecting an item from the Stock Count Items and Stock Re-Count Items screen or an item is scanned. The image display will be controlled by the system parameter. This screen will help you to enter quantity for an item in the stock count. If stock count is not completed then the quantity fields will be editable and user can enter value for counting item. The quantity fields will be disabled for UIN items and RFID enabled items. The value for these fields will be based on the number of UINs/RFID tags scanned.

There is a UIN tab that enables the user to view/add/remove the UINs for the item, if the item is a serial number item. If the user scans a serial number item, they will be taken directly to the UIN tab within the Item Detail screen, for that item.

There is an **Extended Attributes** tab that enables the user to view/capture extended attributes for the item. If the item is not configured to capture extended attributes or there are no extended attributes captured, the list will be empty.

This will be a view-only screen if the stock count is completed and no further edits can be made, or the user has no edit permissions. Items are sorted based on a few different criteria:

- If guided and items are sequenced, the order will be based on the sequence with non-sequenced (no location items) falling at the end.

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- If unguided, items are always sorted by item description.

> **Note**
>
> Removal of an item after it has been added is not allowed in Stock Count unless it is an Ad-hoc stock count.

Units/case field: The sum of the quantity of the items scanned until a new item is scanned. This field indicates the number of items a user has in front of them that they have scanned.

Variance: User will be able to view the difference between the 'snapshot' quantity and the 'Total quantity' counted, provided the user has 'View variance' security permission.

- If the snapshot quantity < Total quantity, display '+' symbol before the variance value.
- If the snapshot quantity > Total quantity, display '-' symbol before the variance value.
- If the snapshot quantity = Total quantity, display '0' symbol before the variance value. This field will be displayed only when the user has 'View Variance' security permission.

It will be calculated dynamically after each scan (count) happens and it will only be displayed for 'counted' items.

> **Note**
>
> If the system is configured to auto save the items for the unguided stock counts depending on the system parameter ‘ Unguided stock counts Automatic Save’, the system will look for the threshold value set in the Auto Save number of items threshold and save the items automatically when it reaches the threshold. The system resets the count and automatically saves the items every time it reaches the threshold. If the user exits before the threshold is met, the system still automatically saves the items and exits.

Last Scan shows the details of the last scanned barcode.

User Quantity is the sum of all quantities for an item since the last time it was saved.

Total Quantity includes the quantities from the database when it was last read, increase with the user quantity.

Example of how the scan quantities work:

1. Scan item A.

   User quantity 1

   Session quantity 1

   Total quantity 1
2. Scan item A again.

   User quantity 2

   Session quantity 2

   Total quantity 2
3. Scan item B.

   User quantity 1

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Session quantity 1

Total quantity 1

4. Scan item A.

   User quantity 1

   Session quantity 3

   Total quantity 3

5. Save count and scan item A.

   User quantity 1

   Session quantity 1

   Total quantity 4

6. Scan item B.

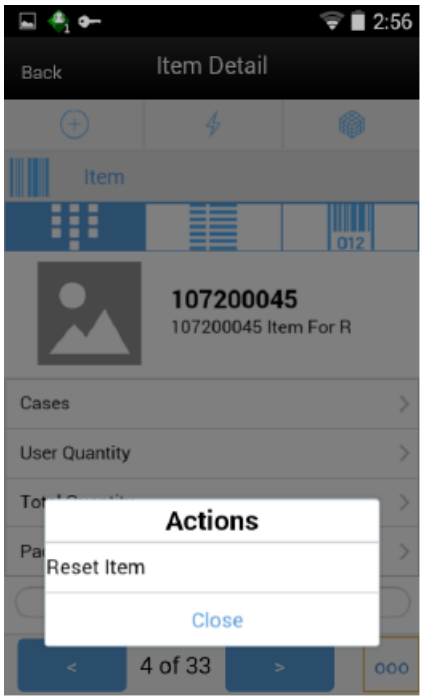
   User quantity 1

   Session quantity 1

   Total quantity 2

Footer Menu

Figure 11-23 Item Detail Footer Menu



If you want to reset the changes done in the same session, you can reset it through the footer menu on the **Item Detail** screen.

Functionality - JET Mobile

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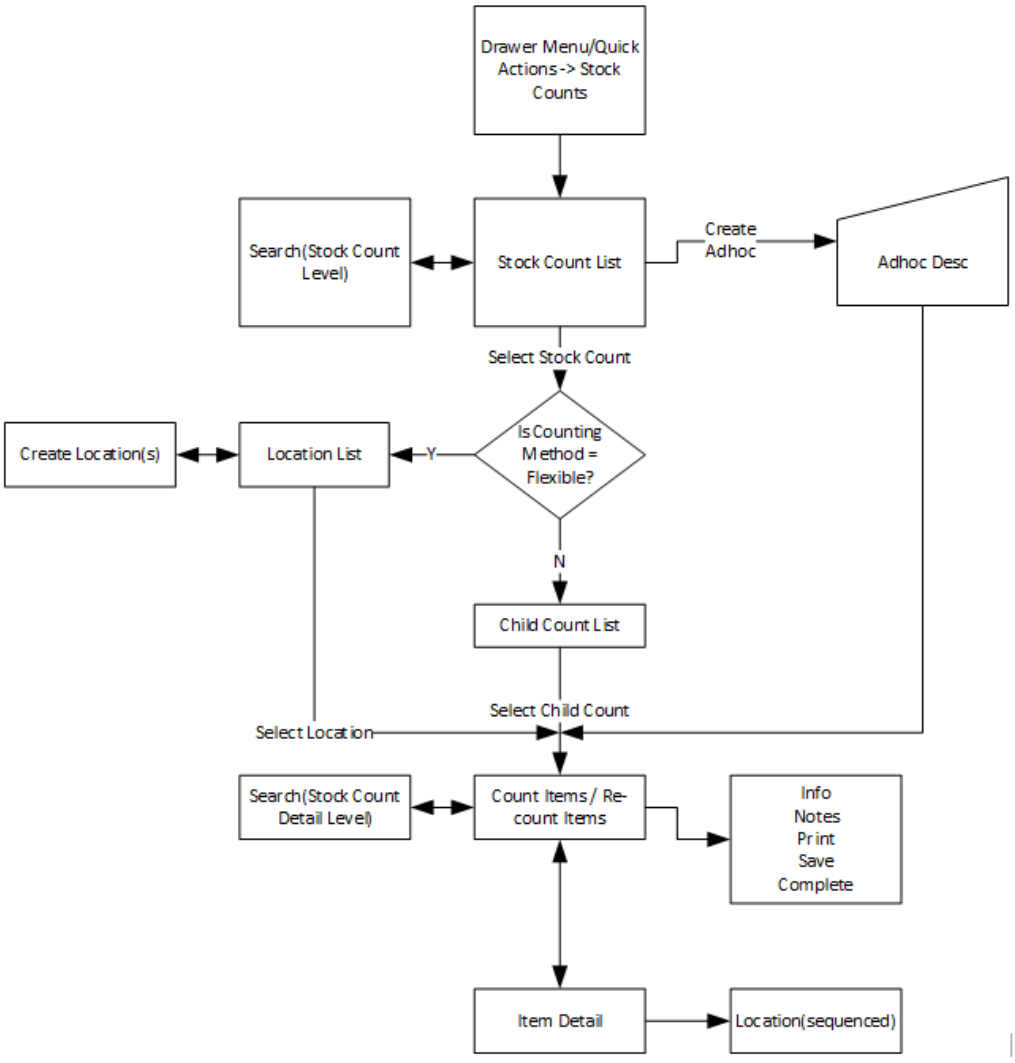
This section explains the functionality of the stock count module screens available in the SOCS Jet Mobile application. While the major functionality of the stock count module in the SOCS Jet Mobile matches with the SOCS MAF, there are some flow changes and modified screens that you need to take note of. Additionally, there could be some missing functionalities like Bulk Scan, Item Basket, etc.

Features

The following is a list of features for Stock Counts in the JET mobile application:

- Search for stock count
- Create a new Ad Hoc stock count
- View or edit an existing stock count
- Count items for stock count
- UIN

Figure 11-24 Stock Count Mobile Screen Flow (JET)



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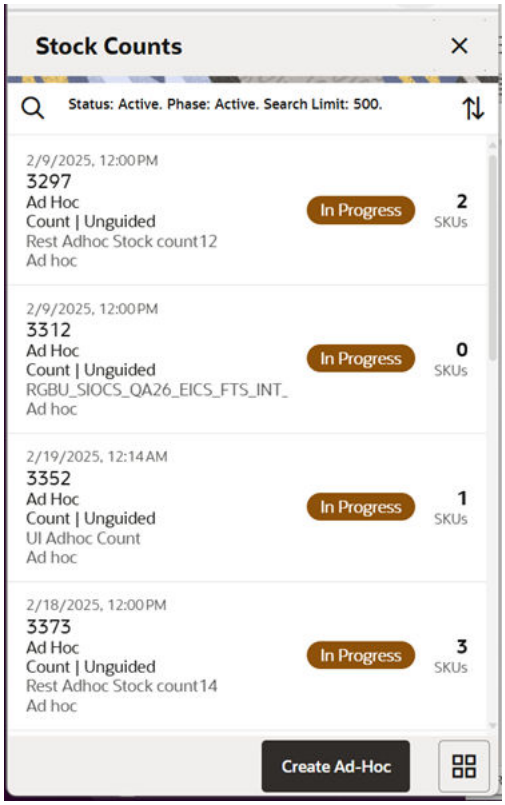
After logging into the mobile application, the main menu drawer is displayed. You can select Stock Counts in the following ways:

- From the Inventory Management menu
- From Quick Actions
- Select an active stock count from the open transactions.
- Select a stock count from Recently Edited.

The Stock Counts module in the mobile application contains Stock Count List, Creating a new Ad hoc Stock count, Child Stock Count List and viewing the item details.

Stock Count (Stock Count List)

Figure 11-25 Stock Count List Screen



You can select Stock Count from the Main Menu Drawer and be directed to the Stock Count screen. You will need permissions to access this screen. This is a list screen, and when you enter the screen the system will default to display records with a status of "Active" and Phase of "Active."

Active Status includes ‘New’ and ‘In Progress’ counts. Active Phase includes Stock Count and Re-Count phases.

On this screen, you can select to Create a new Ad Hoc Stock count if you have proper permissions. Upon selecting the option, you are directed to the Add Stock Count popup.

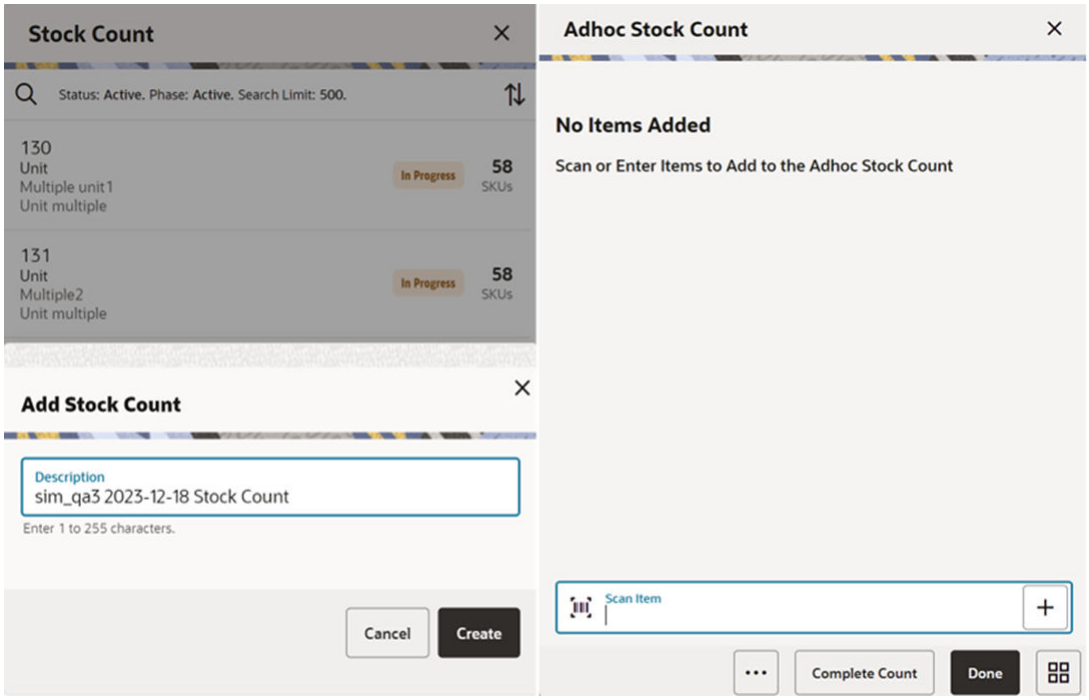
The transactions may include Ad hoc stock count, Unit count, Problem Line count, and Unit and Amount count:

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- You are required to have the Edit Adhoc Stock Count permission to edit an Adhoc stock count.
- You are required to have the Edit Unit Stock Count permission to edit a Unit stock count and Problem Line.
- You are required to have the Edit Unit Amount Stock Count permission to edit a Unit and Amount stock count.

Ad Hoc Stock Count

Figure 11-26 Add Stock Count Popup



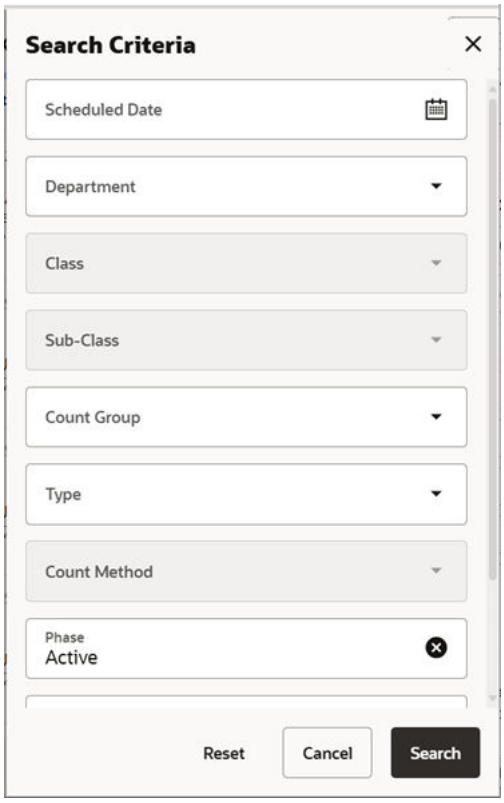
You can select Create Ad Hoc from Stock Count and be directed to the Add Stock Count popup to add a description for an adhoc stock count. You will need permissions to access this screen. When you enter the screen, the text box for entering description for Ad Hoc stock count is defaulted to <user ID> <date> Stock count and can be modified. After entering the description and select to create, the user can add items to the stock count, delete items from the count and complete the count.

The system will navigate to Item List with empty list directly when the user creates ad hoc stock count.

Stock Count - Search Criteria

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Figure 11-27 Search Criteria Screen



You can select the magnifying glass from the Stock Count screen and be directed to the Search Criteria screen. On this screen, you can set the search criteria to filter the stock count list on the Stock Count screen.

Fields

Scheduled Date: The date for which the scheduled stock count is scheduled. Defaults to blank.

Department: List of values containing all of the departments. The value will be defaulted to All. Since a Product Group can consist of more than one merchandise hierarchy, the filter will return all stock counts that are affiliated with the department or where the counting groups contains that hierarchy. When a department is cleared out, the class and sub-class will also be cleared out.

Class: List of values containing all of the classes for the selected department. You must select a department first for the class to be editable. The value will be defaulted to All. Since a Product Group can consist of more than one merchandise hierarchy, the filter will return all stock counts that are affiliated with the class and counting groups that contain that hierarchy. When a class is cleared out, the subclass will also be cleared out.

Sub-Class: List of values containing all of the sub-classes for the selected class. You must select a class first for the class to be editable. The value will be defaulted to All. Since a Product Group can consist of more than one merchandise hierarchy, the filter will return all stock counts affiliated with that subclass and counting groups that contain that hierarchy.

Count Group: List of all product groups that exists in the system. Defaults to All.

Type: Valid values are Unit, Unit and Amount, Adhoc and Problem Line. Defaults to All.

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Count Method: Valid values are Unguided, Guided, Third Party and Flexible. The list of values displayed is dependent on the Type selected. Defaults to All. This dropdown is disabled for Type = Adhoc.

Phase: Valid values are Active, Authorize, Re-Count and Stock Count. Active will include Stock Counts that are in Stock Count and Re-Count phase.

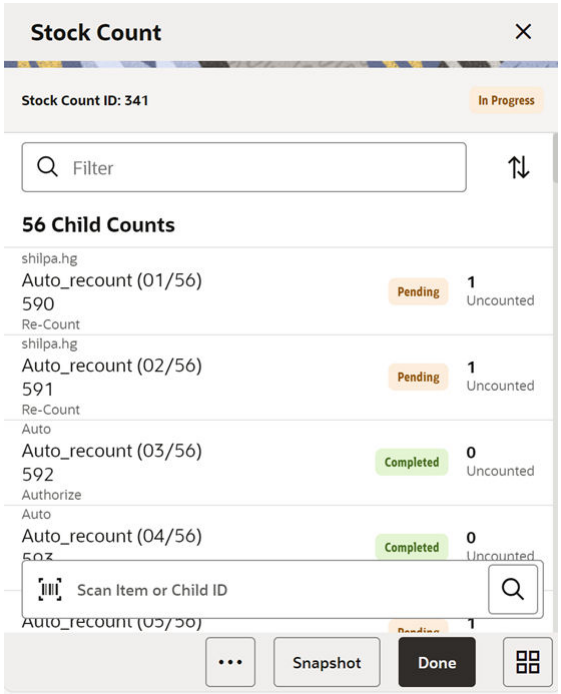
Status: Valid values are All, New, In Progress, Processing, Active, Canceled and Completed. Default value is Active. Active will include New and In Progress stock counts.

> **Note**
>
> Confirmed is the status of a guided Unit and Amount stock count for all items that are in Authorise Phase and have not yet moved to completed due to not having the results exported. Once exported, the stock count will move to Completed status. If the user selects a stock count in Confirmed or Completed status, it will be in view only mode.

Search Limit: This is an entry field. You can define a search limit for the number of transactions being displayed. It is a Required Field. The value will default through a system admin setting, Search Limit Default for stock count list - Mobile.

Stock Count - Child Count List

Stock Count (Child Count List) Screen



You are directed to this screen when you select a Stock Count from the Stock Count (Stock Count List) or from the Open Transactions screen. When you enter the screen, the system will sort the child count by ID. Closed child count should be at the bottom and Active child counts should be at the top and then this ID sorting should be applied.

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This screen is skipped in case of Ad-Hoc Stock Counts. You will be directed to the Item Detail directly when you create an Ad-Hoc Stock count or select an existing ad hoc type of stock count.

Selecting a child count will take you to the Item Detail screen and from there you can select to go to the item list.

If you scan an item to search child count by item and if the system finds more than one result, the system prompts you to select the item from the Select Scanned Item screen.

If the system finds one or more child counts for the scanned item, the system prompts to select the child count from the Select Child Count screen.

You can scan the child ID on the scan bar and if found you are directed to the Item Detail (Stock Count) screen.

Snapshot: Selecting this button will take snapshot for all the child counts on the stock count. This will take a snapshot for Problem line and Unit type of stock counts only. If any other type of stock count, this button will not be visible.

The snapshot of a stock count will happen as follows:

- Unit or Problem Line: Can be taken from Child count list screen for the whole stock count or from the Stock count item screen if not in re-count mode. For Re-Count, it will be taken automatically.
- Ad hoc: Takes snapshot as items are added.
- Unit and Amount: Snapshot for this type can be taken via the Snapshot batch within the desktop application. For unexpected items that get added during counting:
  - If the snapshot has already been taken for the count, it will take the snapshot of the unexpected item as it gets added to the count.
  - If the snapshot has not been taken for the count yet, then the snapshot for the unexpected item will not get taken as the item is added, rather when the snapshot is taken for the stock count.

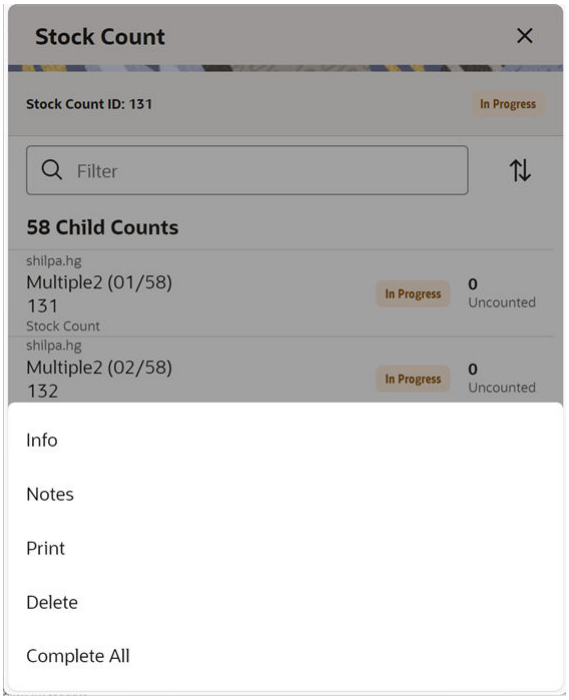
Like a unit count, you must have the Edit Unit Stock Count permission to open the screen in edit mode when displaying a Unit count; otherwise, the screen will open as view only.

You must have the Edit Unit and Amount Stock Count permission to open the screen in edit mode when displaying a Unit and Amount count; otherwise, the screen will open as view only.

Footer Menu on Stock Count (Child Count List) Screen

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Figure 11-28 Child Count List Footer Menu



This opens up a footer menu with following options:

Info: Information (Stock Count Information) popup will be displayed. This is a master stock count level information screen.

Notes: Notes dialog will be displayed.

Print: This will open the print dialogue.

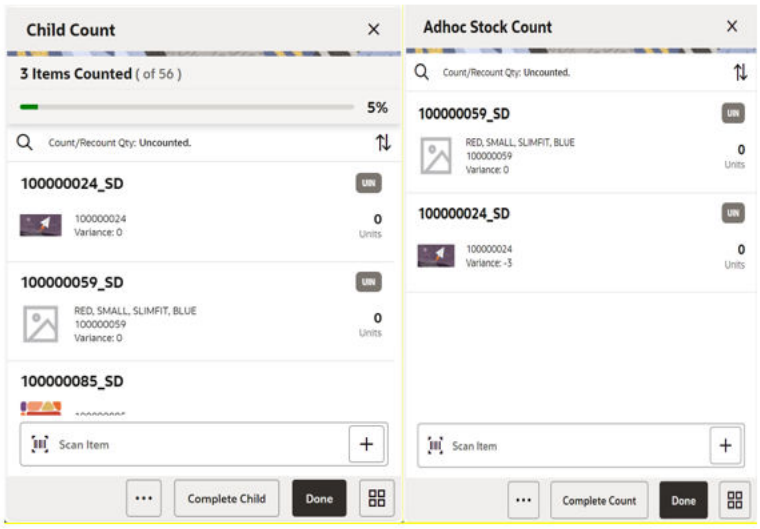
Delete: This will delete the Stock Count that is under consideration and have not yet been authorized.

Complete All: This option allows the user to complete all the child stock counts. This option is allowed if the user is having permission. Upon selecting this option, the system will process all the child stock counts and will complete the count. The system will send the authorized quantities to the upstream system if it is set to auto processing. If the system is able to process all the child stock counts, it will mark the child counts and the master stock count as complete. The system will show the status bar to indicate the progress when the process is running. Any failed children can be resubmitted.

Item List

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Figure 11-29 Item List Screens



This is an Item List screen, and you can reach this screen by selecting the view full item list icon or select from the footer menu on the Item Detail screen.

This screen shows the full list of items in the child count or the Ad Hoc stock count.

You can filter the items using the search criteria. You can refine the search by Counted/Un Counted or by the hierarchy.

If the item has a UIN captured, it will have the UIN icon on the line item.

Selecting an item will go to the Item Detail for that item. If the item scanned/selected is an UIN item, the user will navigate to the Serial Number popup screen to capture the Serial Numbers (UINs).

For the stock count types other than Ad Hoc, you can see the progress bar indicating how many are counted out of the total items.

When you enter the screen, the system will sort the items left to count as below:

- If guided and if items are sequenced, then order by sequence order.
- If it is un-sequenced, "no location" items falling at the end by item description order.
- If unguided, items are always sorted by item description.

Variance: User will be able to view the difference between the 'snapshot' quantity and the 'Total quantity' counted, provided the user has 'View variance' security permission.

- If the snapshot quantity < Total quantity, display '+' symbol before the variance value.
- If the snapshot quantity > Total quantity, display '-' symbol before the variance value.
- If the snapshot quantity = Total quantity, display '0' symbol before the variance value.
- This field will be displayed only when the user has 'View Variance' security permission.
- This value should be calculated dynamically after each scan (count) happens.
- This value will be displayed only for 'counted' items.

Complete Child : Complete Child is a footer button option to complete the child stock count. You need permission to select this button.

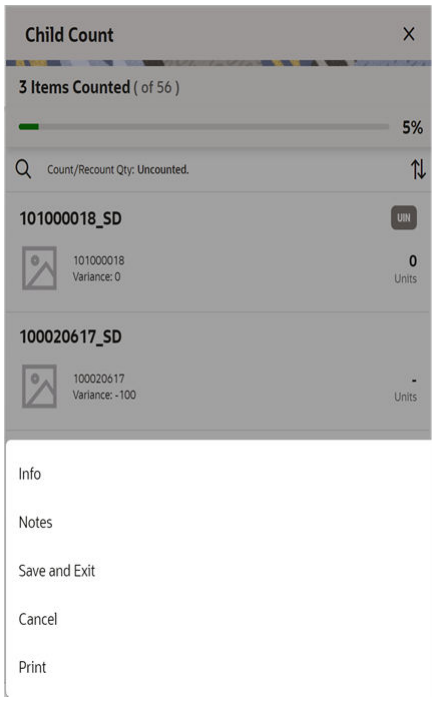
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Complete Count : This footer button is available for the Ad Hoc type of stock counts and upon selecting this option, the system will process the stock count and mark the adhoc stock count as completed.

Additional options are available on the footer menu.

Footer Menu on the Item List

Figure 11-30 Footer Menu



Info: Selecting Info from the Item List footer menu will take you to the Child Count Information popup. Notes: Notes dialog will be displayed.

Notes: Notes dialog will be displayed.

Save and Exit: This will save the child count and navigate you to Stock Count List.

Cancel: This will discard changes to stock count / re-count and navigate you to Stock Count List in case of Ad Hoc and Child Count List in case of other types.

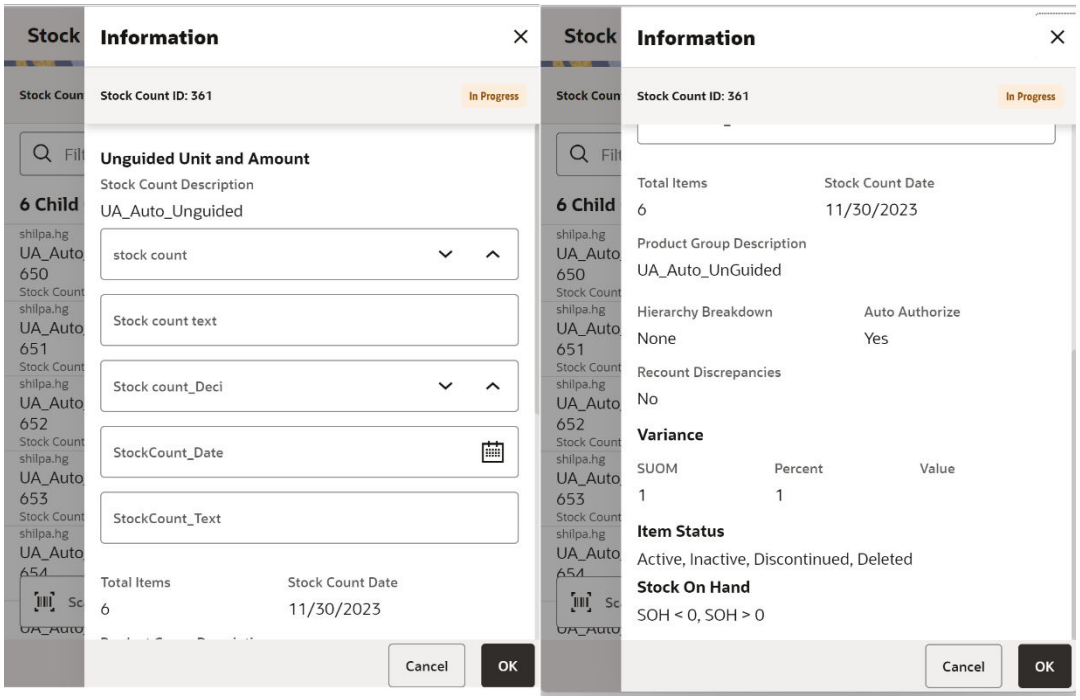
Print: This will open the print dialogue.

Snapshot: This option is visible only for Problem Line and Unit type stock count types. Upon selecting this option, the system will take the snapshot for the child count. The option will not appear if the snapshot is already taken. This option is permission based.

Info (Stock Count Information)

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Figure 11-31 Stock Count Information Screen



This Information popup screen is accessed from the Stock Count (Child Stock Count List) footer menu. This screen provides the header information which includes CFAs and Product Group Information at the master stock count level and allows the user to edit the CFAs. The system displays the list of CFAs (flexible attributes) that have been set up for the Stock Count and Stock Recount in the system and that allows you to enter values for them.

The system displays the CFA fields based on the setup. The CFAs that are set up as **Required** must have a value entered. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permissions are needed, and the count must be in editable status for entering CFA values. The CFA's captured will be displayed read only when it is not in the status to edit.

Details on this screen include:

- Stock Count ID
- Status
- Counting Method and Product Group Type
- Count Description
- Stock count date
- Total Items
- CFAs and the corresponding value
- Product Group Description
- Hierarchy Breakdown
- Auto Authorize
- Re-Count Discrepancies

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- Variance (SUOM, Percent, and Value)
- Item Status (Active, Inactive, Discontinued, and Deleted)
- Stock On Hand

  SOH = 0 - Items that have stock as 0 are in product group.

  SOH > 0 - Items that have stock less than 0 are in product group.

  SOH < 0 - Items that have stock more than 0 are in product group.
- Problem Line

  Actual Pick Amount less than Suggested Pick Amt - Actual pick amount is less than suggested or not is displayed. This field will only be visible if product group is a problem line product group.

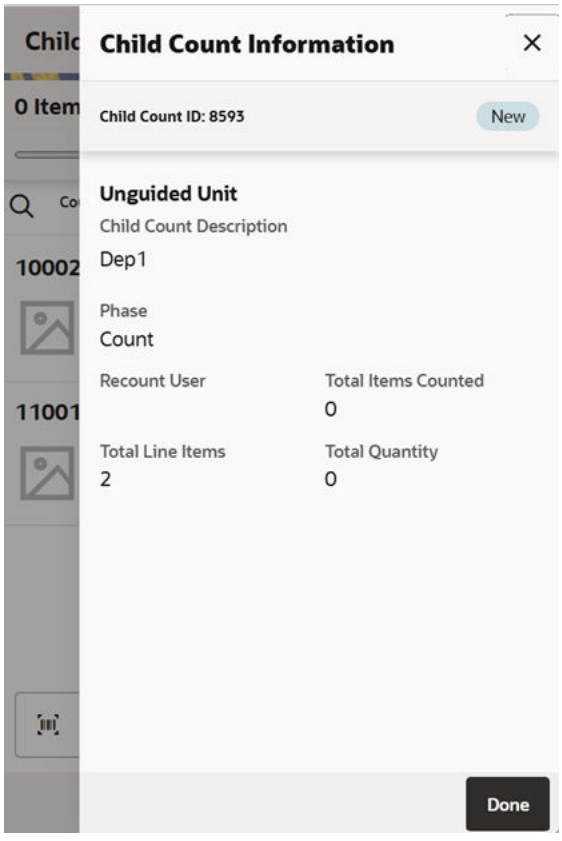
  Actual Shelf Repl Amount less than Suggested Shelf Repl Amount - Actual Shelf replenishment amount is less than suggested or not is displayed. This field will only be visible if product group is a problem line product group.

  Available Negative Inventory - This will display if Negative inventory is available. This field will only be visible if product group is a problem line product group.

  UIN Discrepancy - If any UIN discrepancy is there is displayed. This field will only be visible if product group is a problem line product group.

Child Count Information

Figure 11-32 Child Count Information Screen



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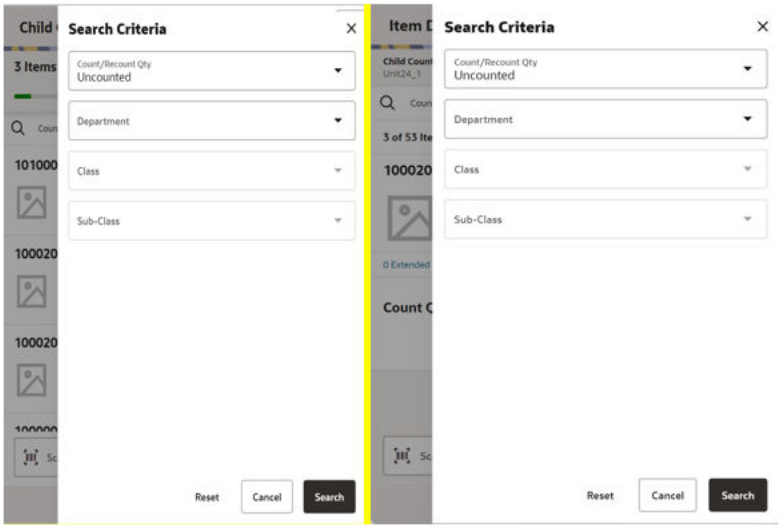
The **Child Count Information** screen is an informational popup that contains read-only information about the child count. It is accessed by selecting Info from the Item List screen.

Details include:

- Child Count ID
- Status
- Counting Method and Product Group Type
- Child Count Description
- Phase
- Count User
- Re-Count User
- Total Items Counted
- Total Line Items
- Total Quantity

Search Criteria - Item List and Item Detail

Figure 11-33 Search Criteria Screens



This search criteria popup screen is displayed when you select the magnifying glass from the Item List or Item Detail screen.

On the item list screen, this helps you to filter the items based on the search criteria applied and on the item detail this will help you to navigate through the items based on the search.

The defaults will be:

- Stock Count: Count / Re-Count Qty = 'uncounted'
- Re-Count: Count / Re-Count Qty = 'uncounted', Filter = 'Discrepant'

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- The Count / Re-Count Qty will default as the filter on the top of the Stock Count / Stock Re-Count screen.

Fields

Count / Re-Count Qty: Valid values are All, Counted and Uncounted. Filter: Valid values are All Items and Discrepant Items. Displays only when it is a Re-Count.

Filter: Valid values are All Items and Discrepant Items. Displays only when it is a Re-Count.

Department: List of values containing all of the departments pertaining to that stock count. The value will be defaulted to All. Since a Product Group can consist of more than one merchandise hierarchy, the filter will return all stock counts that are affiliated with the dept or where the counting groups contains that hierarchy. When a department is cleared out, the class and sub-class will also be cleared out.

Class: List of values containing all of the classes for the selected Department. User must select a department first for the class to be editable. The value will be defaulted to All.

Since a Product Group can consist of more than one merchandise hierarchy, the filter will return all stock counts that are affiliated with the class and counting groups that contain that hierarchy. When a class is cleared out, the subclass will also be cleared out.

Sub-Class: List of values containing all of the sub-classes for the selected Class. You must select a Class first for the sub-class to be editable; the value will be defaulted to All. Since a Product Group can consist of more than one merchandise hierarchy, the filter will return all stock counts affiliated with that subclass and counting groups that contain that hierarchy.

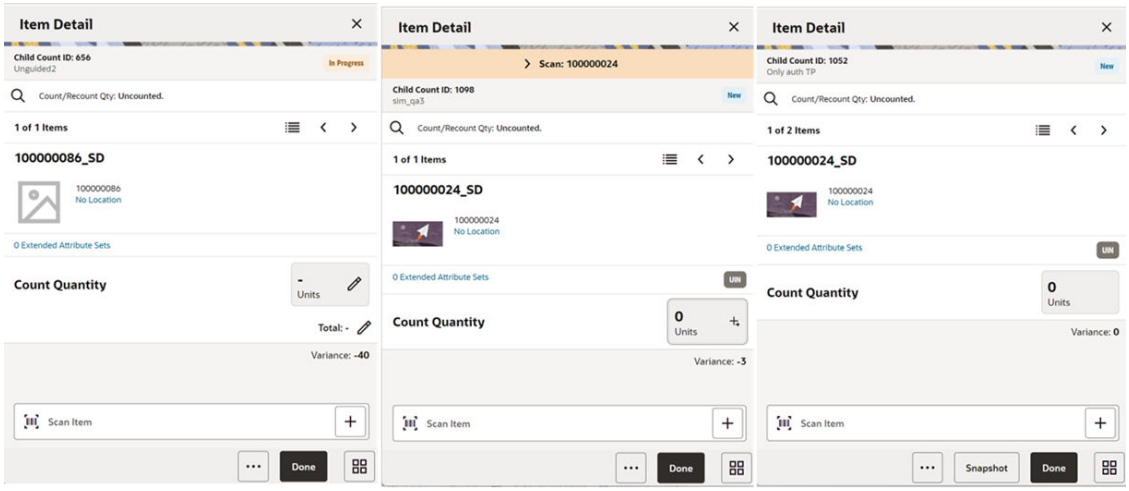
Search: Upon selecting this button, the system will filter the records based on the criteria provided.

Reset: Button will clear the screen of any previous search criteria that was entered by you and set back to the default values. The screen will remain open for you to enter in new search criteria.

Cancel- This will discard the selection and go back to the previous screen.

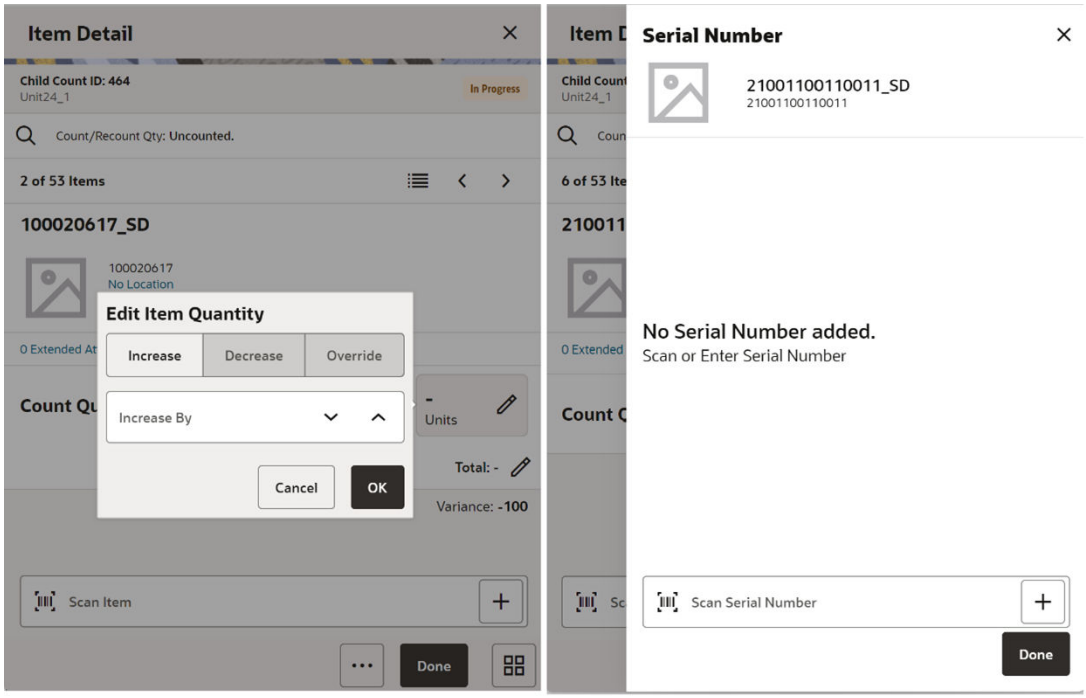
Item Detail

Figure 11-34 Item Detail Screen 1



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Figure 11-35 Item detail Screen 2



You are directed to the Item Detail screen in multiple ways:

- When selecting a child count or when scanning a valid child id on the Stock Count (Child Stock Count List).
- After selecting the child stock count from the Select Child Count screen when there are more child count results for the search.
- After selecting or scanning a valid item on the Count Items(Item List).

You can go to the item list by selecting the Item List icon or selecting the option from the footer menu.

This screen will help you to enter count quantity or the total quantity for an item in the stock count. If stock count is not completed, the quantity fields will be editable, and you can enter value for the item counted. Upon selecting the quantity fields, the system displays the Edit Quantity popup to enter the total quantity or the counted quantity depending on what you select. On this screen you will be able to take the snapshot for the child count.

Below is a detailed explanation on how Count Quantity and Total Quantity work:

Count Quantity – Displays the current scan quantity of the item until another item is scanned. Enter the quantity using the Edit Quantity Popup that is triggered when you select the field.

- It will show 1 when the item is scanned in + scan mode
- It will bottom out to 0 when using – scan mode
- Each time the item is saved, or the item is changed to another item, this quantity is set to 0
- This quantity can be edited only if you have permission.
- The entered quantity in this field is added to the total quantity.
- Value has to be 0 or positive, it cannot be negative.

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- For UIN Serial Numbers (AGSN and non AGSN), the quantity field is disabled and the selecting the edit quantity will take the user to the Serial Number popup screen
  - The Edit Quantity icon will be a <pen>+, + to show that UINs are needed.
  - Quantity would get updated per UINs being added / removed on the UIN panel
  - The system does not look for the Edit Quantity permission for the UIN items.

Total Quantity - This value represents the total child quantity field when the item is added. Can enter the total quantity using the Edit Quantity Popup that is triggered when you select the field.

- This is the user quantity increased by the current scan quantity or entered quantity
- It will bottom out to 0 when using – scan mode
- This quantity can be edited only if you have permission to do so
- Value must be 0 or positive, it cannot be negative.
- This field will be updated real time to display the current total quantity as items are scanned in user's session

This will be a view only screen if the stock count is completed and no further edits can be made, or the user has no edit permissions. Items are sorted based on different criteria:

- If guided and items are sequenced, the order will be based on the sequence with non-sequenced (no location items) falling at the end
- If unguided, items are always sorted by item description

> **Note**
>
> Removal of an item after it has been added is not allowed in Stock Count unless it is an Ad-hoc stock count.

Unit Field: The sum of the quantity of the items scanned until a new item is scanned. It indicates the number of items a user has in front of them they have scanned.

Variance: The user will be able to view the difference between the 'snapshot' quantity and the 'Total quantity' counted, provided the user has 'View variance' security permission.

- If the snapshot quantity < Total quantity, display '+' symbol before the variance value.
- If the snapshot quantity > Total quantity, display '-' symbol before the variance value.
- If the snapshot quantity = Total quantity, display '0' symbol before the variance value. This field will be displayed only when the user has 'View Variance' security permission.

It will be calculated dynamically after each scan (count) happens and it will only be displayed for 'counted' items.

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> **Note**
>
> If the system is configured to auto save the items for the unguided stock counts depending on the system parameter ‘ Unguided stock counts Automatic Save’, the system will look for the threshold value set in the Auto Save number of items threshold and save the items automatically when it reaches the threshold. The system resets the count and automatically saves the items every time it reaches the threshold. If the user exits before the threshold is met, the system still automatically saves the items and exits.

Last Scan: Shows the details of the last scanned barcode.

Count Quantity: View only field which displays the count quantity in Re-count phase and Authorization phase. Displayed in Re-count phase provided the user has the 'View Count Quantity' security permission.

Re-count Quantity: View only field which displays the re-count quantity. Displayed only in Authorization phase and only if the stock count went through re-count.

Extended Attributes Sets: The extended attributes option is available only if it is configured in the store parameter and the user has proper permission.

- If the proper permissions do not exist, the screen will be read only.
- It is a link that will take the user to the Extended Attributes screen.
- <x >represents the number of attribute sets assigned; initially it will be zero.

Examples of how the scan quantities interact

Scan item A

User quantity 1

Session quantity 1

Total quantity 1

Scan item A again

User quantity 2

Session quantity 2

Total quantity 2

Scan item B

User quantity 1

Session quantity 1

Total quantity 1

Scan item A

User quantity 1

Session quantity 3

Total quantity 3

Save count and scan item A

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User quantity 1

Session quantity 1

Total quantity 4

Scan Item B

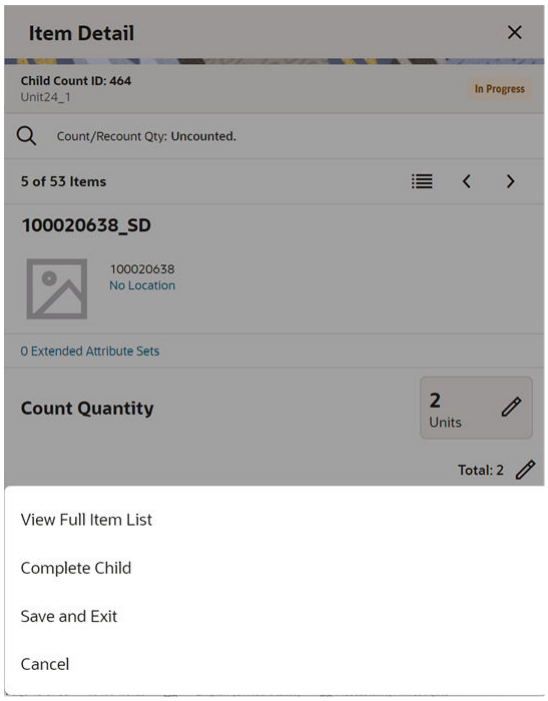
User quantity 1

Session quantity 1

Total quantity 2

Footer Menu

Figure 11-36 Item Detail Footer Menu



View Full Item List - Upon selecting this menu, you are navigated to the Item List.

Complete Child - This will complete the child count and go to the Stock Count (Child Stock Count List).

Complete Count - This is applicable for Adhoc stock count. Upon selecting this the system will complete the adhoc stock count.

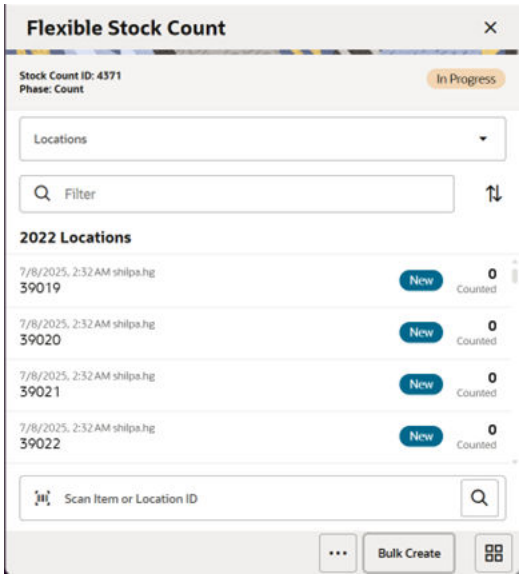
Save and Exit -This will save the child stock count and exit to the child stock count list screen.

Cancel - This will discard changes to stock count / re-count and navigate you to Stock Count (Child Stock Count List).

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Flexible Stock Count

Figure 11-37 Flexible Stock Count (Location List) Screen



You are directed to this screen when you select a Stock Count (having Counting Method = Flexible) from the Stock Count (Stock Count List) or from the Open Transactions screen or from the Recently Edited screen. The user must have the Access Flexible Stock Counts permission for the flexible stock counts to open in edit mode.

This screen will list the locations created so far. It will be empty if the stock count is new. When you enter the screen, the system will sort the locations by Location ID. Closed locations should be at the bottom and Active ones should be at the top, and within the group, the sort is based on Location ID.

You can filter the locations based on status (Active or Closed).

Selecting a location will take you to the Item Detail screen and from there you can select to go to the Item List.

You can search a location by scanning a location ID or by item. If you scan an item to search for a location and if the system finds more than one result, the system prompts you to select the item from the Select Scanned Item screen.

If the system finds one or more locations for the scanned item, the system prompts to select the location from the Select Location screen.

While you scan an item or a location and if only one location is found, you are directed to the Item Detail screen of the first item.

You must have the Edit Flexible Stock Count permission to open this screen in edit mode; otherwise, the screen will open as view only.

Footer Buttons:

Quick Create: This button, displayed only in Count phase, enables the user to create location(s). The store parameter 'Flexible Stock Count Location Creation' must be set to

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'Manual' and you must have the 'Create Flexible Stock Count Location' security permission for this button to be available. When clicked, it takes you to the ‘Create Location‘ screen.

Bulk Create: This button, displayed only in Count phase, enables you to create location(s) in bulk. The store parameter 'Flexible Stock Count Location Creation' must be set to ‘Bulk‘ and you must have the 'Create Flexible Stock Count Location' security permission for this button to be available. When clicked, the ‘Create Location‘ popup is displayed where the user can enter the number of locations to create.

Footer Menu:

The footer menu has the following options:

Notes: This will open the Notes dialog.

Print: This will open the print dialogue.

Info: This will open the Information (Stock Count Information) popup. This is a master stock count level information screen.

Snapshot: Selecting this option will take the snapshot for the whole stock count. This option is available only for Unit type of stock counts. If it is a ‘Unit and Amount‘ type of stock count, the snapshot should be taken by running a batch available in EICS.

Delete: This will delete the Stock Count that is under consideration and has not yet been authorized.

Complete All: This option allows you to complete all the location counts. This option is allowed if you have the ‘Complete All Stock Count Children‘ security permission. Upon selecting this option, you will be notified that the count will be moved to the next phase. This is a warning so that you complete the count only after all the locations are created and counted. The system will process all the locations and will complete the count. If the system is able to process all the location counts, it will mark the locations and the master stock count as complete. The system will show the status bar to indicate the progress when the process is running. The count will be moved to the re-count phase if discrepancies are found and the count is set for a re-count. If not, the count will move to the ‘Authorize‘ phase. The system will send the authorized quantities to the upstream system if it is set to auto processing.

All processes that would normally be used for regular unit and amount or unit counts will be executed when updating the child count. For example, in a Unit and Amount count, for an item that was extracted in the stock count but had not been counted, the system will default ‘0’ for count quantity. For unit counts, depending on the parameter 'Stock Count Null Count Quantity = 0', the count quantity for an uncounted item will be set to either '0' or 'null(uncounted)'. If the count qty gets set to '0', the item may become discrepant (considering variance) and they will be listed in the recount. Since the uncounted items do not have a location associated with them, such items will be added to a system generated location(s) and get listed in the recount. The number of items added to a location depends on the system parameter Unit Count UI Limit/Unit and Amount Count UI Limit.

To improve speed of scanning, no validation on whether the item is meant to be on the count or not is done on scanning. Items that are not meant to be on the count and that don’t qualify to be added to the count, will be seen in the Rejected Items screen in EICS.

> **Note**
>
> When all locations are completed, it is still required to press the ‘Complete All‘ button to prevent a user from completing a count, and not all locations have been tagged yet.

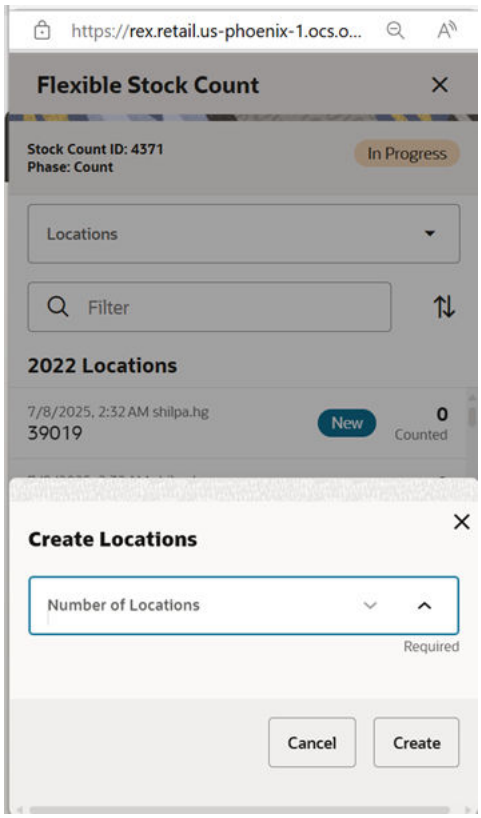
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If the snapshot has not been taken yet for a Unit and Amount count an error message is displayed that the snapshot has to be taken. If the location is in count phase the system will run a discrepancy algorithm and if needed it will move the location to re-count, otherwise the count will be ready to Authorize.

Done: This will open the Stock Counts (List) screen

Create Location (Bulk)

Figure 11-38 Create Location (Bulk)

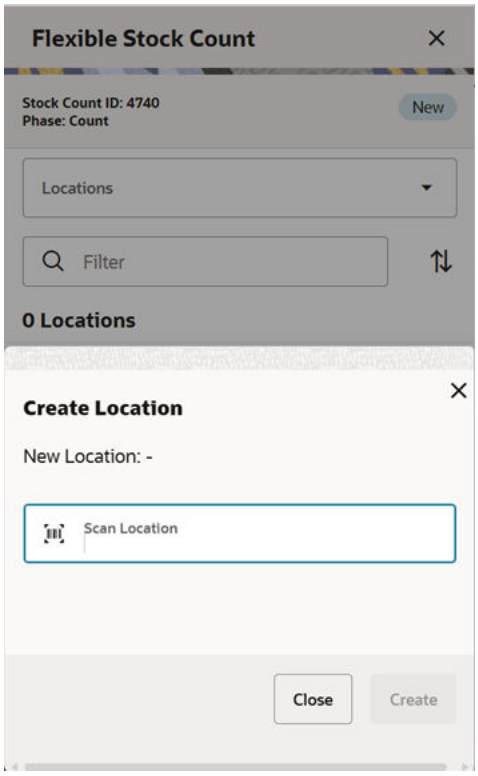


This screen is displayed when the user clicks on the **Bulk Create** Footer button. The user can specify the number of locations that need to be created. As part of this process, the retailer will usually print tickets to hang on fixture and shelves based on the locations generated here.

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Create Location (Quick)

Figure 11-39 Create Location (Quick)



This screen is displayed when the user clicks on the **Quick Create** Footer button. The user can enter or scan a location ID/barcode to create a location. The user will have to mention the pre-count value for the location if configured (Set Pre-count Value for Flexible Locations - system parameter).

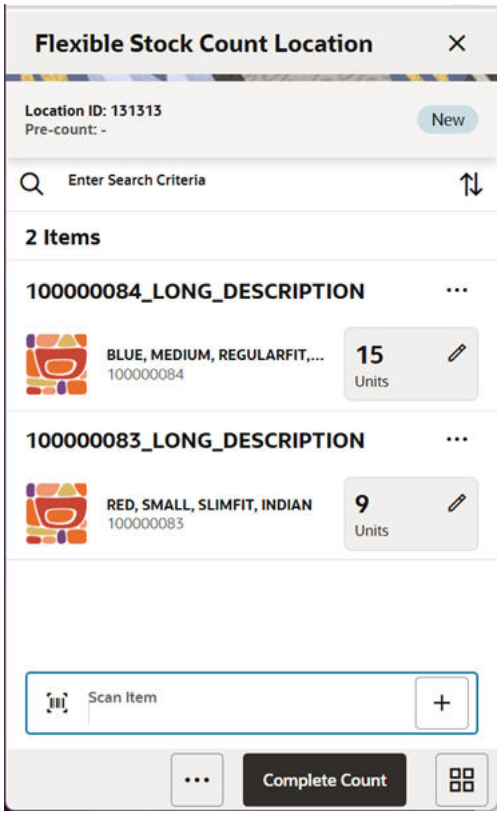
In this process, shelves and fixtures are tagged with pre-created tags. This dialogue records that tag number.

As part of this process, the user can also enter the ‘Pre-count‘ quantity. This quantity indicates how many items are located on the fixture or shelf the tag is adhered to.

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Flexible Stock Count Location

Figure 11-40 Flexible Stock Count Location Screen



This is an Item List screen and you can reach it by selecting the **View Full Item List** icon or select **View Full Item List** option from the footer menu on the Item Detail screen. The screen will open in edit mode only when the user has the ‘Edit Flexible Stock Count‘ permission and the location is not completed.

The screen shows the full list of items in the location along with the quantity counted. The default sort order would be by Item ID, ascending.

In the Count phase, the screen will be empty until the user starts counting items. The user can scan items to add them to the count. For unit counts, if the snapshot was not taken yet, while scanning the first item, a message is displayed to the user.

In case the system is configured with the pre-count quantity validation check, and a pre-count quantity has not been filled out (this can be due to bulk generation), you can enter the pre-count number at this time.

In the re-count phase, the retailer can choose to count all items or only discrepant items using the store parameter 'Flexible Re-count discrepant items only'. If this parameter is set to ‘Yes‘, discrepant items are pre-populated and allowed to count. If this parameter is set to ‘No‘, all items in the location will be listed, and the user can count all items. The user with ‘View Count Quantity‘ permission can view the quantity counted from the Count phase. Locations with no discrepant items will not be re-generated for the re-count.

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You can filter the items using the search criteria. You can refine the search by the hierarchy or by Counted/Uncounted (in re-count phase only).

If the item has a UIN captured, it will have the UIN icon on the line item.

Selecting an item will go to the Item Detail for that item. If the item scanned/selected is an UIN item, the user will navigate to the Serial Number popup screen to capture the Serial Numbers (UINs).

Footer Button:

Complete Count: This option is available only when the counting is in progress status. Upon selecting this option, the system will process the stock count. The validation on whether the total count quantity of the location matches the pre-count quantity happens here (only in count phase). For the items that have not been extracted as part of the count, if they don't qualify to be added to the count, they will be seen in the Rejected Items screen in EICS. If the snapshot was not taken yet for a Unit and Amount count and if this is the last location to be completed, the status of the count will move to 'Pending' instead of completing and move to the next phase. If the location is in count phase, the system will run discrepancy algorithm and if needed, it will move the location to re-count, otherwise the count will be set up for Authorization. All processes that would normally be used for regular unit and amount or unit counts will be executed when updating the child count. For example, in a Unit and Amount count, for an item that was extracted in the stock count but had not been counted, the system will default '0' for count quantity. For unit counts, depending on the parameter 'Stock Count Null Count Quantity = 0', the count quantity for an uncounted item will be set to either '0' or 'null(uncounted)'. If the count qty gets set to '0', the item may become discrepant (considering variance) and they will be listed in the recount. Since the uncounted items do not have a location associated with them, such items will be added to a system generated location(s) and get listed in the recount. The number of items added to a location depends on the system parameter Unit Count UI Limit/Unit and Amount Count UI Limit.

Additional options are available on the footer menu.

Footer Menu:

Notes: The Notes dialog will be displayed.

Print: This will open the print dialogue.

Cancel: This will discard changes to stock count / re-count and navigate you to the Flexible Stock Count screen.

Save and Exit: This will save the changes made to the location count and navigate you to the Flexible Stock Count screen.

Delete: This will allow the user to delete the location. This is possible only in count phase. The user must have the Delete Flexible Stock Count Location permission for this option to be available.

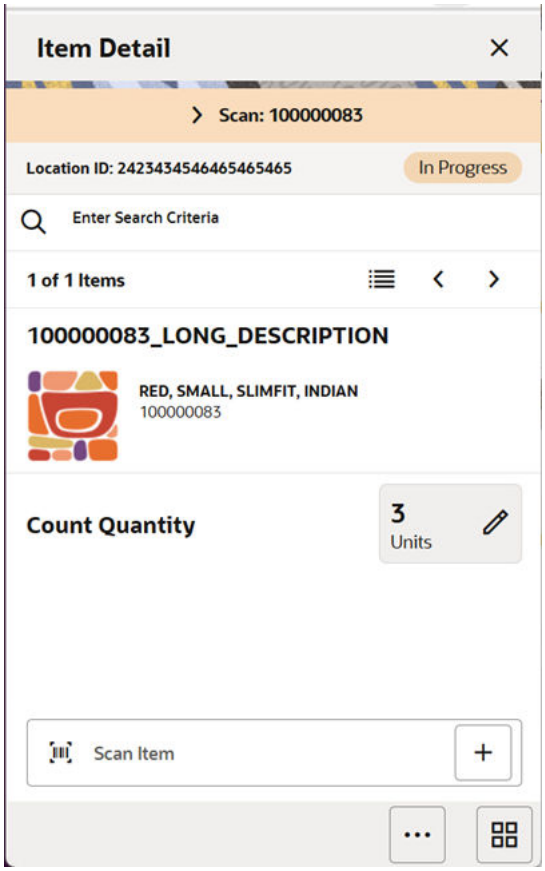
Snapshot: This option is visible only for Unit type stock count types. Upon selecting this option, the system will take the snapshot. The option will not appear if the snapshot is already taken. This option is permission based.

Item Detail (Flexible Stock Count)

Figure 11-41 Item Detail Screen

e

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You are directed to the Item Detail screen in multiple ways:

- When selecting a location or when scanning a valid location ID on the Flexible Stock Count screen.
- After selecting a location from the Select Location screen when there are more location results for the search.
- After selecting or scanning a valid item on the Flexible Stock Count Location screen.

You can go to the item list by selecting the Item List icon or by selecting the option from the footer menu.

This screen will help you to enter count quantity for an item in the stock count. If the stock count is not completed, the quantity field will be editable, and you can enter a value for the item counted. Upon selecting the Quantity field, the system displays the Edit Quantity popup to enter the counted quantity. On this screen you will be able to take the snapshot for the count.

Detailed explanation of how Count Quantity works:

Count Quantity: Displays the count quantity of the item scanned. Enter the quantity using the Edit Quantity Popup that is triggered when you click on the field. The count quantity also increases when you scan the item.

- The system will increment the quantity by 1 when the item is scanned in + scan mode.
- The system will bottom out the quantity to 0 when using – scan mode.

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> **Note**
>
> The value has to be 0 or positive, it cannot be negative.

- For UIN Serial Numbers (AGSN and non AGSN), the quantity field is disabled and selecting Edit Quantity will take the user to the Serial Number popup screen. The Edit Quantity icon will be a <pen>+ to show that UINs are needed. The quantity will get updated by UINs being added or removed on the UIN panel.

> **Note**
>
> The system does not check the Edit Quantity permission for the UIN items.

The screen will be view only if the stock count is completed and no further edits can be made, or if the user has no edit permissions.

Last Scan: Shows the details of the last scanned barcode.

Footer Menu

View Full Item List: Upon selecting this menu, you are navigated to the Item List.

Complete Count: This option is available only when the counting is in progress status. Upon selecting this option, the system will process the stock count. The validation on whether the total count quantity of the location matches the pre-count quantity happens here (only in count phase).

If a pre-count is set up, the system will prompt the user for the pre-count value validation. If this is different from the original pre-count entered, a warning message will appear. The user will have the option to continue with completing the location or go back and do some additional validation. All processes that would normally be used for regular unit and amount or unit counts will be executed when updating the child count. For example, in a Unit and Amount count, for an item that was extracted in the stock count but had not been counted, the system will default ‘0’ for count quantity. For unit counts, depending on the parameter 'Stock Count Null Count Quantity = 0', the count quantity for an uncounted item will be set to either '0' or 'null(uncounted)'. If the count qty gets set to '0', the item may become discrepant (considering variance) and they will be listed in the recount. Since the uncounted items do not have a location associated with them, such items will be added to a system generated location(s) and get listed in the recount. The number of items added to a location depends on the system parameter Unit Count UI Limit/Unit and Amount Count UI Limit.

Save and Exit: This will save the child stock count and exit to the child stock count list screen.

Cancel: This will discard changes to stock count / re-count and navigate the user to the Flexible Stock Count screen.

Quick Count

The Quick Count dialog can be accessed from the drawer/menu on the Jet Mobile application. This dialog enables the store users to do a quick count of inventory in the store across multiple locations on the fly without scheduling a stock count, taking a snapshot or authorizing the count results.

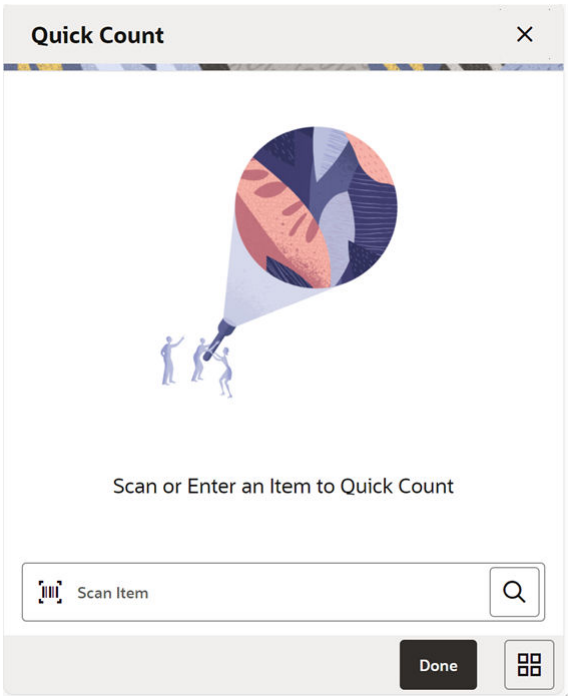
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This feature helps the retailer to keep an eye on the inventory and do a quick stock count of any random item(s) like high priced, fast moving, etc and match the inventory with the physical count in the store.

Features:

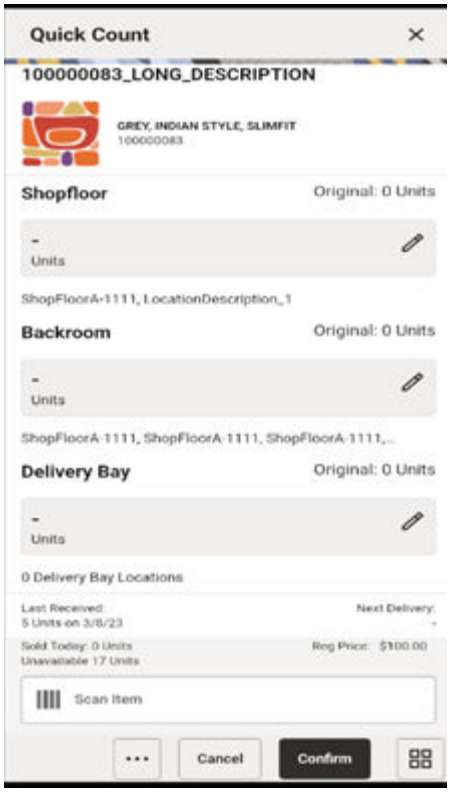
- Update inventory of Shop Floor, Backroom and Delivery Bay of an item or just the available inventory based on configuration.
- Adjust the quantity of all inventory buckets of an item to zero.
- Add the selected item to the item basket.
- Print Ticket.

Figure 11-42 Quick Count Screen



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Figure 11-43 Quick Count Screen: Item



The Quick Count screen can be accessed from the menu drawer and Quick Actions. On this screen, the user can enter or scan an item to update the inventory.

This feature works only for simple items and the following are not supported:

- UIN Items
- Non Inventory
- Complex Packs

Simple packs that are held at the component level will be substituted at the component item level for tracking inventory

The user can access this only when the proper permission is assigned.

User can scan or enter an item on the scan bar and the system will display the item if it is valid. On this screen, the user can see the current values of the inventory buckets and enter the actual quantity to be updated on the individual buckets. Scanning the next item is not a confirmation on this screen. User must enter the values using the Edit quantity widget and confirm for the system to update.

Non inventory items are not allowed on this screen.

The shopfloor, backroom and delivery bay are only displayed when they are leveraged in the system. If they are turned off, then only available inventory will be shown to the user.

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Confirm Quick Count

Upon selecting the **Confirm** button, the system updates the inventory based on the values entered in Shop floor, Back room and Delivery bay quantities or available bucket if shopfloor/ backroom are not managed in SIOCS.

Depending on the inventory buckets tracked in SIOCS, the following rules will apply when the system updates available inventory. Note that this type of stock count does not set SOH to 0 when nothing is counted, so there is no impact on driving the inventory negative when unavailable inventory exists.

- The available bucket = Shop Floor+Backroom+Delivery bay. If not configured for these buckets, available will be update with the counted quantities.
- In case a bucket is not counted, the original value will be applied. With other words a blank value does not equate to a 0 count.
- Update process will create an inventory adjustment in the system using the inventory adjustment reason with appropriate disposition.

Use Cases

1. Assume current inventory bucket values in the system are SOH =100, Available=80, Unavailable=20, Shop floor=20, Backroom=40 and Delivery bay=20.
2. User starts counting an item and scans the item, e.g. 1234.
3. Assume counted quantity in Shop floor=30, Backroom=20 and Delivery bay=10 and user enters the quantity on the respective buckets on this dialog.
4. The system will update the SOH=80, Unavailable=20(not altered), Shop floor=30, Backroom=20 and Delivery bay=10.

The system displays the Shop Floor and Backroom fields only when ‘Display Shop floor/ Backroom quantity’ system setting is enabled.

The delivery bay is only displayed when the Replenishment - Delivery Bay Inventory parameter is turned on.

Additional informational fields on this screen include:

- **Last Received** - how many were last received on allocation, DSD, transfer.
- **Next Delivery** - the quantity on the next delivery. It is the in transit (In bound qty) for the ASN (Transfer,DSD, allocation)
- **Sold Today** - number of units sold today for item and store in the SUOM.
- **Unavailable** - This field holds the total unavailable stock on hand. Unavailable = Total Stock on Hand – Available SOH
- **Regular Price** - shown if the item is on regular price. Also shown if the item is on Promo. Will not display if item is on clearance.
- **Promo Price** - will display if there is a promo for the item. May also display if the item is on clearance.
- **Clearance Price** - will display if the item is on clearance.

Footer Menu

From the footer menu, the user can access the **Adjust to Zero**, **Add to Item Basket** and **Print Ticket** functions.

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Add to Item Basket — User can select this option to add the item to the Investigate Item Basket. Item is added to the latest active investigate type item basket.

Remove from Item Basket — Selecting this option will remove the item from the item basket.

Print Ticket — If the user is having permission to print the tickets, this option can be used to print the tickets.

Printer — This will show the list of printers configured including the blue tooth printers. During the session, the ‘default’ printer is the one the user selected first.

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12

Customer Order Management

This chapter is divided into the following sections:

- Customer Orders MAF Mobile
  - Only allows customer orders that are designated as “full flow”.
- Customer Orders JET Mobile
  - Quick Flow Customer Orders

    Only allows customer orders that are designated as “quick flow”.
  - Full Flow Customer Orders
    * Customer orders marked as “full flow“ can be viewed and executed in the customer order full flow.
    * Customer orders marked as “quick flow“ can be only viewed in the customer order full flow, and they can be excecuted only in the customer order quick flow.
- Customer Order Status Flow

> **Note**
>
> As Customer Orders come into the system they will be designated as “full flow“ or “quick flow“ based upon the store admin setting, ‘Customer Order Flow Default‘.

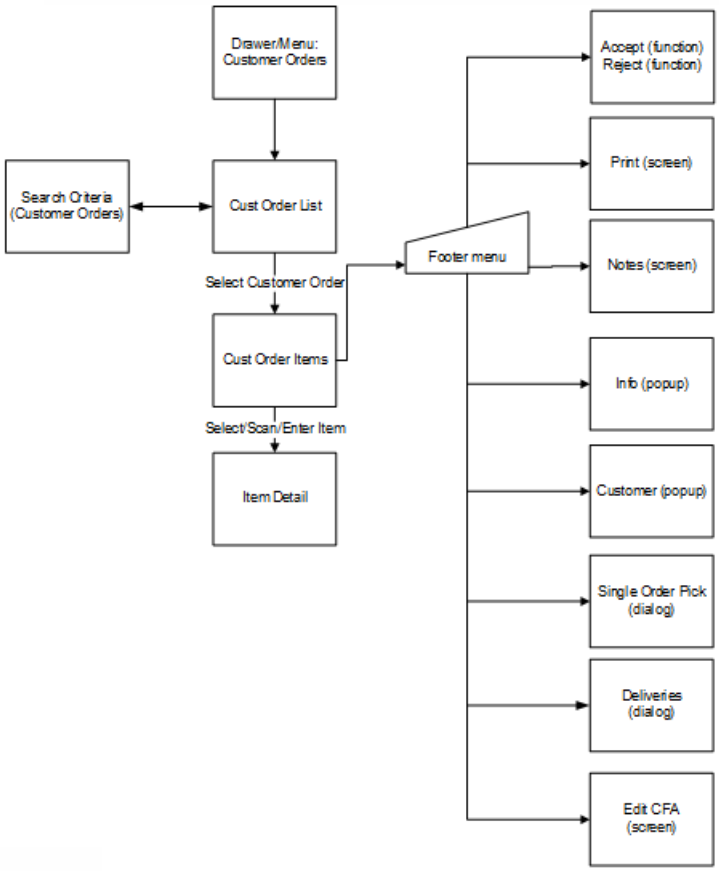
Customer Orders MAF Mobile

Customer Orders allows for the viewing of customer orders at the user's store. Customer orders may be web orders as well as non-web orders such as layaway, pick up, and so on.

- Search for customer orders
- View an existing customer order
- Reject a customer order
- View customer information
- Print a customer order
- Create a customer order pick for a specific customer order
- Access the delivery dialog for a specific customer order
- Enter values for CFAs (Custom Flexible Attributes)

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Figure 12-1 Customer Order Screen Flow

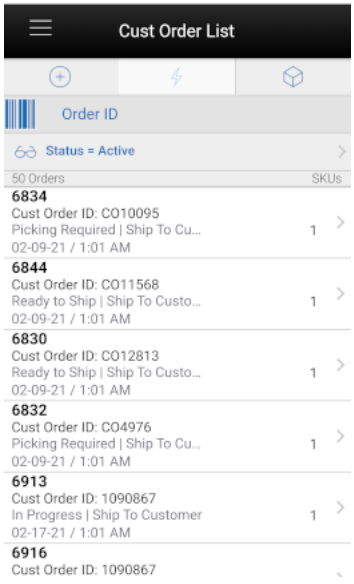


Customer Orders covers the functionality of viewing, accepting, and rejecting a customer order as well as viewing the information and customer details, specifying values for CFAs. Deliveries and single order picks can be created from within a customer order, however, Deliveries and Picking will be covered as part of their own functionality.

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Customer Order List

Figure 12-2 Customer Order List Screen



The **Cust Order List** screen is accessed by selecting the **Customer Order** menu option from within the **Customer Order Management** menu in the drawer/menu.

When the store parameter **Picking Required for Customer Orders** is set to **No**, the screen will display the **Active** status customer orders by default which is all customer orders which are in New, In Progress, or Under Review status.

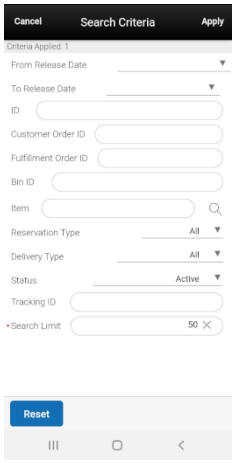
If the store parameter **Picking Required for Customer Orders** is set to **Yes**, the screen will display the **Active** status customer orders by default which is all customer orders which are in one of the following statuses: New, Picking Required, Pick In Progress, Reverse Pick, Ready to Ship, Ready for Pickup, Delivery In Progress, Under Review.

The user can click the eye glasses to direct to the Search Criteria (Customer Orders) screen. Selecting a customer order will navigate to the details for the customer order.

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Search Criteria (Customer Orders)

Figure 12-3 Search Criteria Screen (Customer Orders)



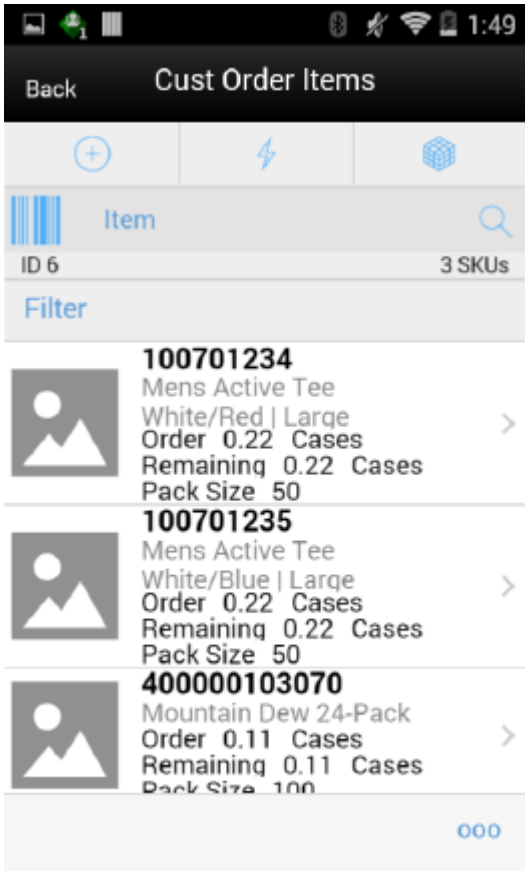
The Customer Order Search Criteria screen is accessed by the eye glasses on the Customer Order List screen. After applying the search criteria, the results will be listed on the Customer Order List screen and the criteria applied will show.

- From/To Release Date
- Store Customer Order ID
- Customer Order ID
- Fulfillment Order ID
- Bin ID
- Item
- Reservation Type
- Delivery Type
- Status
- Tracking ID
- Search Limit

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Customer Order Items

Figure 12-4 Customer Order Items Screen



The Cust Order Items screen is used to select a customer order from the Customer Order List screen. The items are listed for the customer order. The item image for the line items is displayed per configuration.

Line items appear in a list and selecting a line item will navigate to the item details of that item. Scrolling in the list of items on the left will display a filter. The filter can be used to narrow down the list of items. Filtering can occur by item ID or item description.

Scanning or entering an item in the scan bar will navigate to the Item Detail (Customer Orders) screen for that item. The ellipsis in the lower right hand corner will access the Footer menu which will contain all of the functions that can be performed on a customer order.

> **Note**
>
> If the order has duplicate items, meaning an item exists on the customer order more than once, the items will appear multiple times in the list with the corresponding line numbers listed as well. This applies to all screens that display the item within customer orders, customer order picking, customer order deliveries, and customer order reverse picking.

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Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Customer Order Items screen. The menu functions will include the following.

Info: Info will access the Info popup.

Notes: The Notes option accesses the notes common dialog to capture notes. Notes will always be available for viewing and user can create notes regardless of the status of the customer order, provided the user has Create Notes permission.

Edit CFAs: This option takes the user to Edit CFAs screen to enter values for the CFAs that are set up for Customer Orders.

Edit Customer Order: This option takes the user to the Edit Customer Order screen to specify the Hold Location.

Customer: The customer information popup for the customer order will display, view only.

Pick: Pick will generate a pick for the customer order and navigate the user to the Pick Items screen for the new pick. All picking rules apply. If picking by Area is configured for the store, the user will navigate to the Create Pick popup to select an Area first. See Customer Order Picking.

Delivery: Navigates to the Delivery dialog (Delivery List screen) for the current customer order. See Customer Order Deliveries.

All states of customer orders as well as all types (web order, pick up, layaway, and so on).

The user must have 'Access Customer Order Delivery' permission.

Accept: Accept will only be for web order types of customer orders of status 'New' or 'New but in Under Review mode' and after the customer order is accepted at the store, it will go through the required process for it to be shipped.

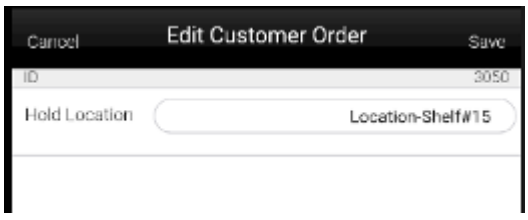
Reject: Reject will be available for web order types of customer orders in any status except 'Completed' and 'Cancelled'. All item quantities that have not yet been picked will be canceled/ rejected. A system generated reverse pick will be created for the rejected items. For more information, see Customer Order Reverse Picks.

Back: Back will return to the Customer Orders List, no changes made to status.

Print: Print will display the common print dialog to print the customer order report.

Edit Customer Order

Figure 12-5 Edit Customer Order



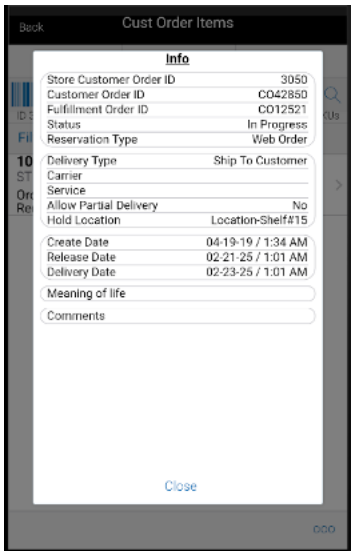
This screen can be accessed by clicking on **Edit Customer Order** footer menu option from the Customer Order Items screen. This screen enables the user to specify the hold location of the

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customer order. This screen is available when the Customer Order status is in any status except 'Completed' or 'Cancelled'. Also, system parameter **Customer Order Fulfilment Restriction** is set to **Restricted** for this screen to be available.

Info (Customer Orders)

Figure 12-6 Info Popup (Customer Orders)



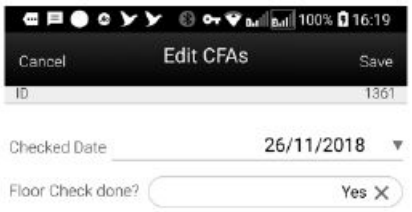
The Info popup contains read-only information about the header level of the customer order. It is accessed through the Info menu option in the Footer menu on the Customer Order Items screen. Details include:

- Store Customer Order ID
- Customer Order ID
- Fulfillment Order ID
- Status
- Reservation Type
- Delivery Type
- Carrier
- Service
- Allow Partial Delivery
- Hold Location: Location where the items are put for pickup by a customer.
- Create/Release/Delivery Date
- Comments
- CFAs along with the value. The CFAs, without a value captured, will have a blank value against them

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Edit CFAs Screen

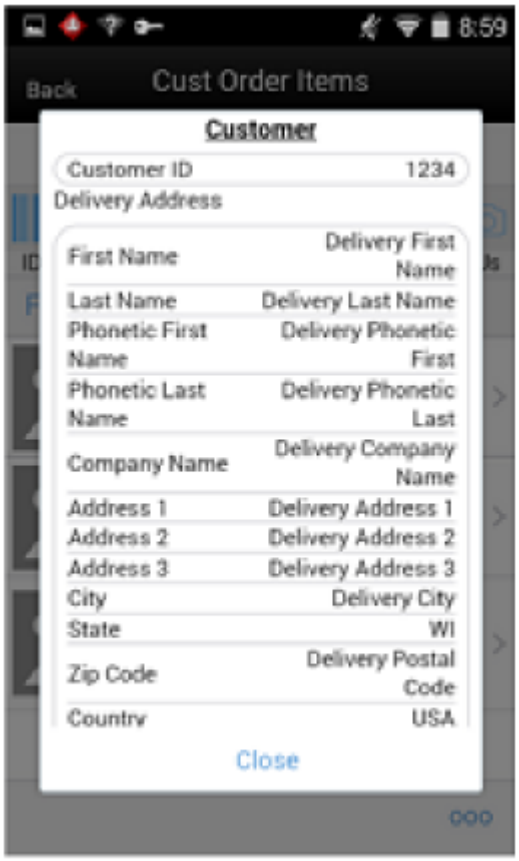
Figure 12-7 Edit CFAs Screen



The Edit CFAs screen displays the list of CFAs (flexible attributes) that have been set up for Customer Orders, in the desktop application and lets the user enter values for them. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed for entering CFA values.

Customer

Figure 12-8 Customer Popup



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The Customer popup has read-only information about the customer for web order types of customer orders. It is accessed through the Customer menu option in the Footer menu on the Customer Order Items screen. The user must have access customer details security permission.

Item Detail (Customer Orders)

Figure 12-9 Item Detail Screen



The Item Detail screen allows selecting or scanning an item and is accessed from the Customer Order Items screen. Scanning or entering an item on this screen in the scan bar will refresh the item detail screen for the item on the customer order. The user can page through the items on the customer order. This screen is view only.

The item information including the image (which is system configured) displays in the header. The bottom portion of the screen contains information regarding the item such as:

- UOM
- Pack Size
- Remaining Quantity
- Order Quantity
- Picked Quantity
- Delivered Quantity
- Canceled Quantity
- Last Update
- Comments
- Last Scan: Displays the details of the last scanned barcode at the bottom of the screen.

Lastly, if the item is a substitute for another item, the Substitute For field will display with the original item listed.

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Customer Order Picking

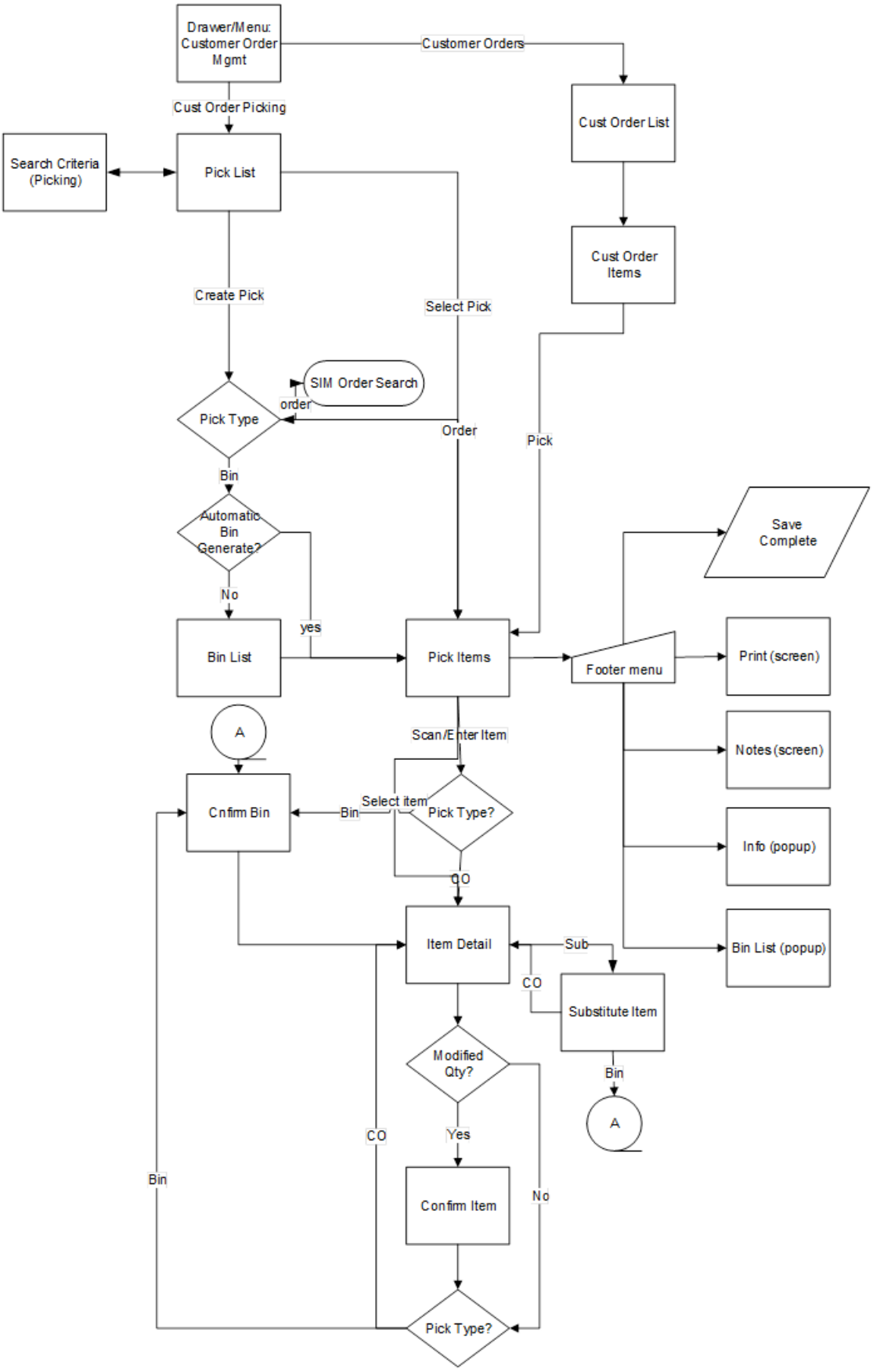
The Picking process is a formal process of the system telling the user what items need to be picked and the user going out, physically picking the items, and setting them aside. Once the items are set aside, they will then be used during the fulfillment process for shipping to, or pick up by the customer.

Features:

- Search for customer order pick
- View/edit an existing customer order pick
- Delete a customer order pick
- Create a customer order pick

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Figure 12-10 Customer Order Picking Screen Flow



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The user will access the Customer Order Picking Dialog from the Customer Order Mgmt menu in the drawer. The Pick List screen will display the list of Active picks. The user can go to the Search Criteria (Pick List) screen to search for picks using alternate criteria.

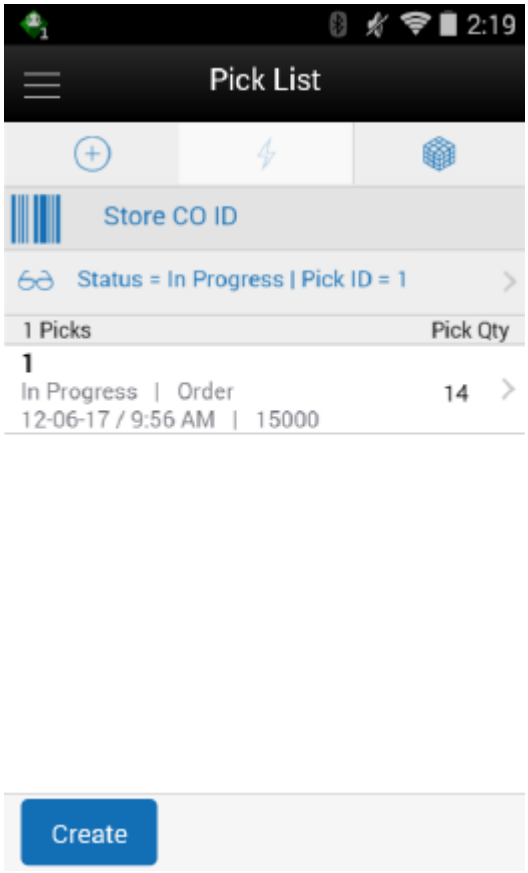
From the Pick List screen, the user can select a pick to go to the Pick Items (detail of pick) for viewing or editing purposes.

Also from the Pick List screen, the user can Create a pick. The pick may be created by bin or customer order. When creating by customer order, the user will need to specify which order is being picked and, once that is done, the system will generate a pick and navigate to the details of that Pick on the Pick Items screen. When creating by bin if the system is configured to automatically generate the bins, the user will go to the details of the Pick (Pick Items). Otherwise, if manual bin capture, the user must first capture the bins before going to the Pick Details.

Once in a pick, the user can pick items, add substitutes, print, add notes, view info, modify bins, save, or complete the pick.

Pick List

Figure 12-11 Pick List Screen



The Pick List screen is accessed by selecting the Customer Order Picking menu option from within the Customer Order Mgmt menu in the drawer/menu. The screen will display the Active status customer orders picks by default which is all picks which are in New or In Progress status. The user can click the eye glasses to go to the Search Criteria screen. Selecting a pick

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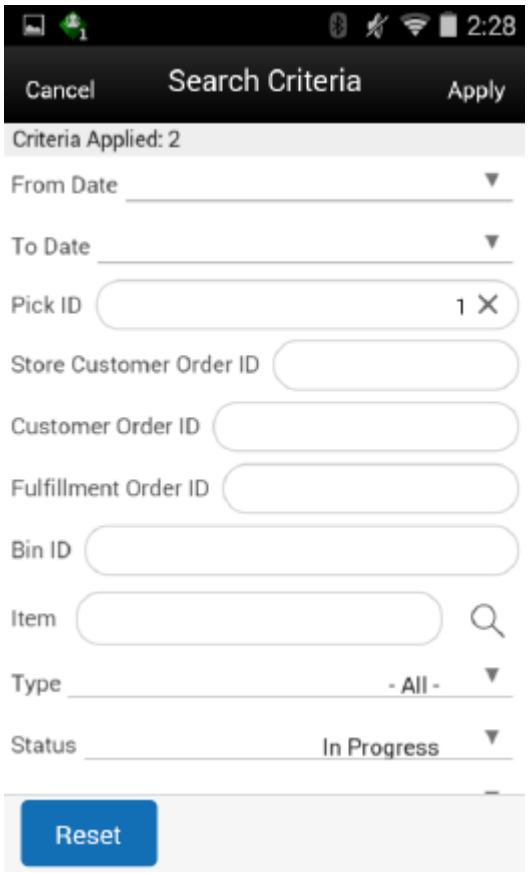
will navigate to the details for the customer order pick. Selecting Create will display the Create Pick popup.

Important fields on this screen include:

- **ID**: System-generated Pick ID.
- **Status**: Status of the customer order pick.
- **Type**: Either Bin or Store Customer Order.
- **Suggested Pick Quantity**: Total quantity to be picked across all line items.
- **Date**: Date that the pick was either created or completed.
- **User**: User that created or completed the pick.

Search Criteria (Pick List)

Figure 12-12 Search Criteria Screen (Pick List)



This is the Customer Order Pick Search Criteria Screen. It is accessed by the eye glasses on the Pick List screen. After applying the search criteria, the results will be listed on the Pick List screen and the criteria applied will show. Search criteria includes:

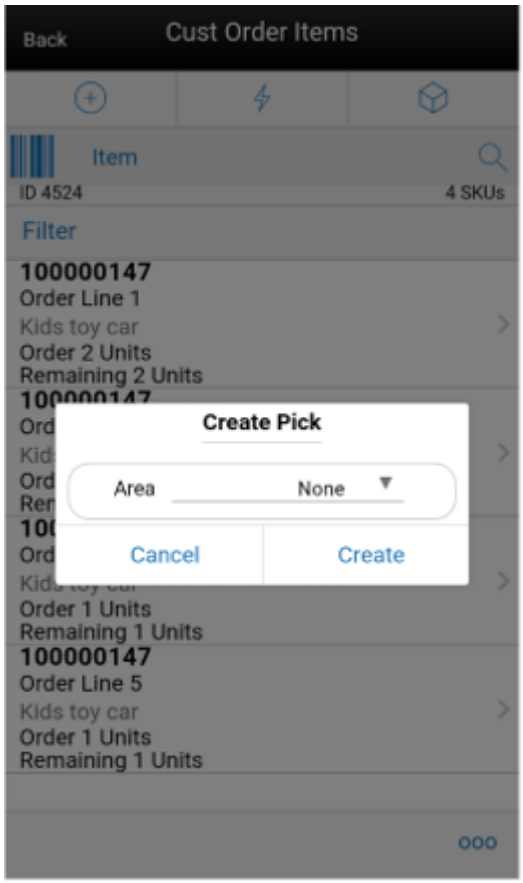
- From/To Date
- Pick ID

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- Store Customer Order ID
- Customer Order ID
- Fulfillment Order ID
- Bin ID
- Item
- Status
- Reservation Type
- User
- Search Limit

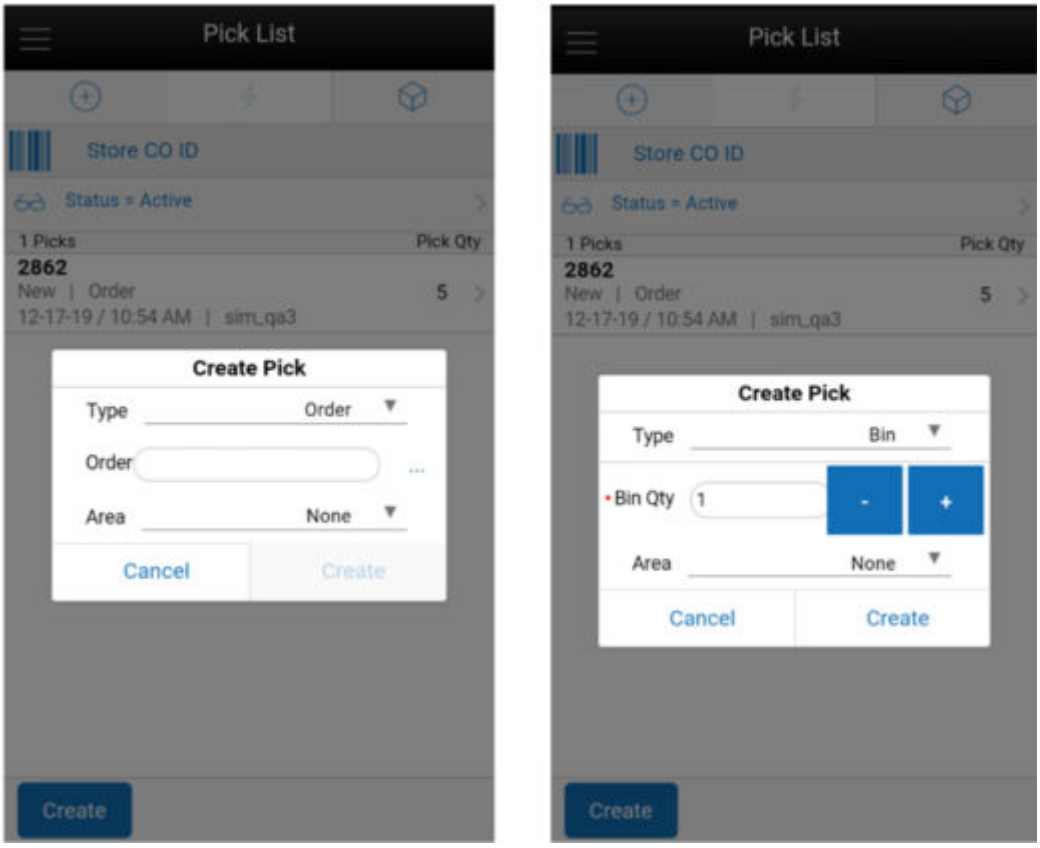
Create Pick

Figure 12-13 Create Pick Popup within a Customer Order



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Figure 12-14 Create Pick Popup within Picking



The Create Pick popup is accessed by selecting the **Create** button from the Pick List screen. The create pick allows for the creation of a customer order pick by either Store customer order ID or by bin. The type will default per the store setting **Default Customer Order Picking Method**. The store must be configured for **Reserve Customer Order Inventory Upon Receiving** set to **No** in order to create or generate a pick by bin or Store Customer Order. This means that inventory is reserved when the customer order arrives into the store and therefore it should be picked from inventory. When set to **Yes**, inventory is reserved based upon receipts and therefore should be picked from the receipt. The user would not want the store to pick from inventory when it should be picked based upon what was received on the delivery.

When selecting Store Customer Order, the user must enter in the Store customer order ID to be picked or use the search function to select one from the list. When creating a pick by Store Customer Order ID, there will only be one Customer Order Fulfillment Order per pick transaction.When creating a pick by bin, the user will define the number of bins to be put on the pick. Initially, the bin quantity will be defaulted based upon the store admin setting **Default Number of Bins**. The user has the potential to override this quantity if the store admin setting **Override Bin Quantity** is set to **Yes**.

Picks created by Bin allows for multiple customer orders to be put on the pick; one store customer order per bin. It will first look to all store customer orders that are the oldest based upon release date. All other rules for creating the pick will be the same as those above for picking by store customer order ID.

In both by Store Customer Order ID and bin a pick can be created by Area. Picking by Area allows a user to create a pick for a customer order that is for a specific Area of the store. This is only possible if the store configuration **Allow Picking by Area** is set to **Yes** and the system

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admin of **Customer Order Fulfillment Restriction** is set to **Transaction Controlled** (meaning that the entire customer order does not have to be picked in one pick). Areas are set up in the desktop application in the Area dialog. If Area is an option, the system will give a list of **Completed** status Areas, with one of the options being **None** for no area.

Upon selecting **Create**, the user will navigate to the Pick Items screen for the generated pick.

Customer Orders that will be available for picking will follow these rules:

- Customer order must be a web order type.
- Customer order must still be open.
- There cannot be an existing open pick for the customer order.
  - If Area is being used, open picks are allowed for the customer order, so long as it is not for the same area.
- Customer order must have at least one item on the order with items remaining to be picked.
- If the system admin Customer Order Fulfillment Restriction equals Transaction Controlled, the system will also need to check that there is stock available to be picked for at least one item.
  - If pick is by Area of **None,** all items from the customer order will be put on the pick.
  - If the pick is for a specific area, the system will put the items from the customer order which are in the selected area.
- If Customer Order Fulfillment Restriction equals Restricted, there must be enough available stock for all items on the pick to be fully picked in their entirety.
- If Customer Order Fulfillment Restriction equals Line Controlled, user will not be able to create the pick if there is not enough available stock to pick at least one item fully.
- Items that have substitute equal to Yes on the customer order (meaning they allow for substitutes) will have their stock ignored. This is because they can have items substituted for them.

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Figure 12-15 Bin List Screen

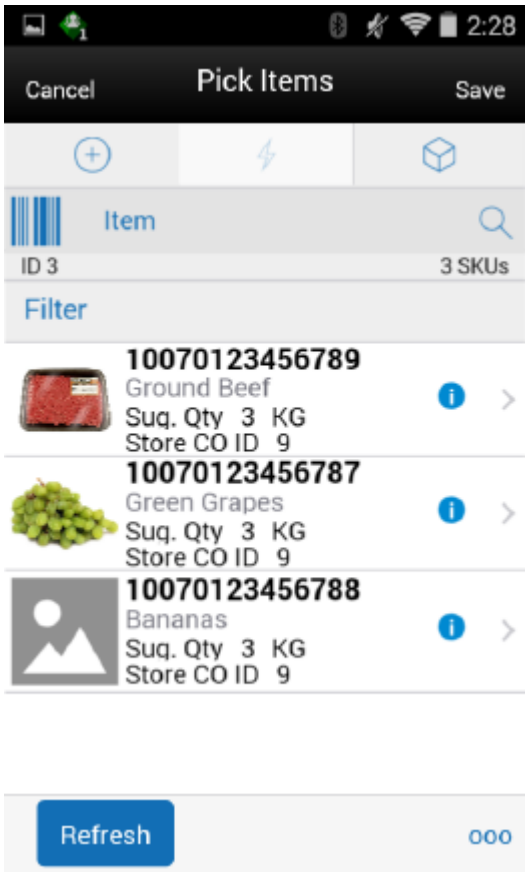


The Bin List screen applies to those picks which are by bin. Picks by bin will have bins manually or system generated per the store admin setting. For manually-captured bins, the user will be directed to the Bin List screen immediately upon creating the pick prior to going to the Pick Items screen. Bins are only editable for manually-captured bins. System and manually captured bins can be viewed from the Bin option within the footer menu of the Pick Items screen. The bins can be printed through the Print button.

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Pick Items

Figure 12-16 Pick Items Screen



The Pick Items screen is accessed by selecting an existing pick from the Pick List screen, or by creating a new pick. The Pick Items displays all of the items on the pick including substitute items which will be listed below the original item with an arrow referencing up to the original item. Fields will include the suggested pick quantity, quantity (actual picked quantity) and store customer order ID or bin ID based upon the pick type. Selecting an item will navigate to the Item Detail screen for that item. Scanning an item will also navigate to the Item Detail screen for that item and the quantity may be updated per the quantity scanned. If the pick is by bin, the user will go to the Confirm Bin screen to scan the bin prior to going to the Item Detail screen.The items are listed in order with those items with stock on hand in the backroom being displayed first, followed by items with shopfloor stock on hand, and lastly those that do not have stock on hand in either the backroom or the shopfloor. All items are ordered by macro sequence location.Items will have an icon displayed denoting the pick status of the item. If the item's pick quantity has quantity left to be picked there will be a blue circle with an 'i'. If the item's pick quantity is fully picked, it will be a green circle with a check mark. If the item's pick quantity has exceeded the amount to be picked (because changes to the customer order have been made such as a delivery or cancelation), there will be a red circle with a '!'.Refresh will refresh the customer order pick and pull in any delivered or canceled quantities that have happened for the delivery. The Adjusted Pick Quantity will reflect the new suggested pick quantity.

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Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Pick Items screen. The menu functions will include the following:

Info: Info will access the Info popup.

Notes: The Notes option accesses the notes common dialog to capture notes. Notes can only be added for picks by Store Customer Order ID. The note will be saved on the customer order and not the pick.

Edit CFAs: This option takes the user to Edit CFAs screen to enter values for the CFAs that are set up for Customer Order Picking.

Bins: Accesses the Bin List screen.

Refresh: Perform the same function as the refresh on the Pick Items screen.

Confirm: Confirms the pick and move it to Completed status and, the user returns to the Pick List screen.

Save: Saves the pick as In Progress status and return the user to the Pick List screen.

Delete: Allows for deleting of a New or In Progress status pick and moves it to Canceled status. The user will return to the Pick List screen.

Cancel: Exits to the Pick List screen and no changes will be saved.

Back: Back is only applicable to view only picks and will exit to the Pick List screen.

Print: Print will display the common print dialog to print the customer order pick report.

Quantity Validation

When confirming, if any of the store customer order quantities on the pick transaction have been canceled or delivered since the pick was created, and the total pick quantity for the item is now greater than the remaining pick quantity:

- The Adjusted Pick Qty field will be updated to indicate to the user how much is needed to pick based upon the changes (delivery and cancels) that were made on the customer order.

Upon confirm, the system will check the system admin, Customer Order Fulfillment Restriction:

- If it is set to Restricted, the entire customer order must be picked in its entirety.
- If it is set to Line controlled, any item that is getting picked must be picked in its entirety.
- If it is set to Transaction Controlled, no restrictions as above.

Tolerances

- When the item has a variable unit of measure, it can be difficult to pick the exact amount suggested. For example: picking 2 pounds of bananas might end up truly being 2.2. The quantity picked may exceed the suggested if the defined tolerances are setup to allow for such.

Substitute Items

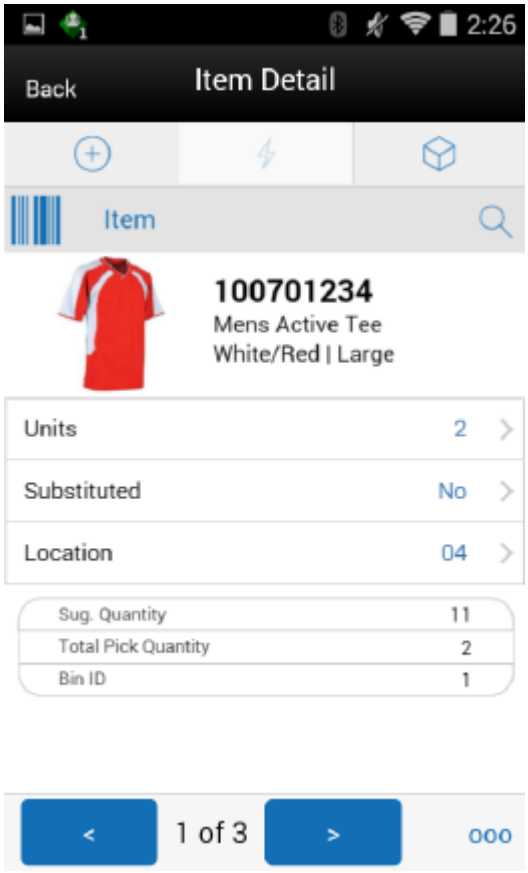
- Substitute Items are considered in the Total Pick Qty when doing all quantity validations.
- The reserved quantity for the original item is decreased by the rolled up pick quantities.

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- The substituted items that have an actual pick quantity greater than zero will have their reserved quantity increased for the amount being substituted.

Item Detail (Picking)

Figure 12-17 Item Detail Screen



The Item Detail screen contains the details for the specific item on the customer order pick. Entering/scanning an item on this screen will refresh the screen and update item and the pick quantity for the item. If the pick is by bin, first the user will have to Confirm the bin before refreshing the details for the item. Once an item has been fully picked, the system will automatically navigate to the next item on the pick.

The Pick Quantity, represented by the field on the top of the screen with the UOM label is editable by the user and represents how many of this item is being picked. Editing the quantity is controlled by security. If the quantity is edited, the user will be prompted with the Confirm Items popup to confirm the proper item and also the confirm bin (if pick is by bin).

The suggested pick quantity displays the quantity the system suggests to be picked. The adjust pick qty is the suggested pick quantity that is updated by the system upon refresh or trying to confirm the pick. It reflects any deliveries or cancellations that have occurred on the customer order since the time the pick was generated. Total Picked is the total amount picked for the item along with all of its substitute items. Lastly, if the pick is by Store Customer Order ID, that ID will be displayed. Otherwise, if the pick is by bin, then the bin for the pick will be displayed.

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If the item allows for substitute items, there will be a Substituted field that will state Yes if there is one or more items substituted, and No if there are no substitutes. Tapping on this field will navigate to the Substitute Items screen. If the item is being substituted for another item, there will be a Substituted For field and it will display the original item ID that the item is being substituted for.

If **Display Sequence Field**s equals **Yes**, the macro location and area for the item will be displayed. If it set to **No**, this field is not displayed.

If there is stock on hand in the backroom:

- It will display the first available backroom location.
- If no backroom location, it will display Backroom.

If there is no stock in the backroom and stock exists in the shopfloor:

- It will display the first available shopfloor location.
- If there is no shopfloor location, it will display Shopfloor.

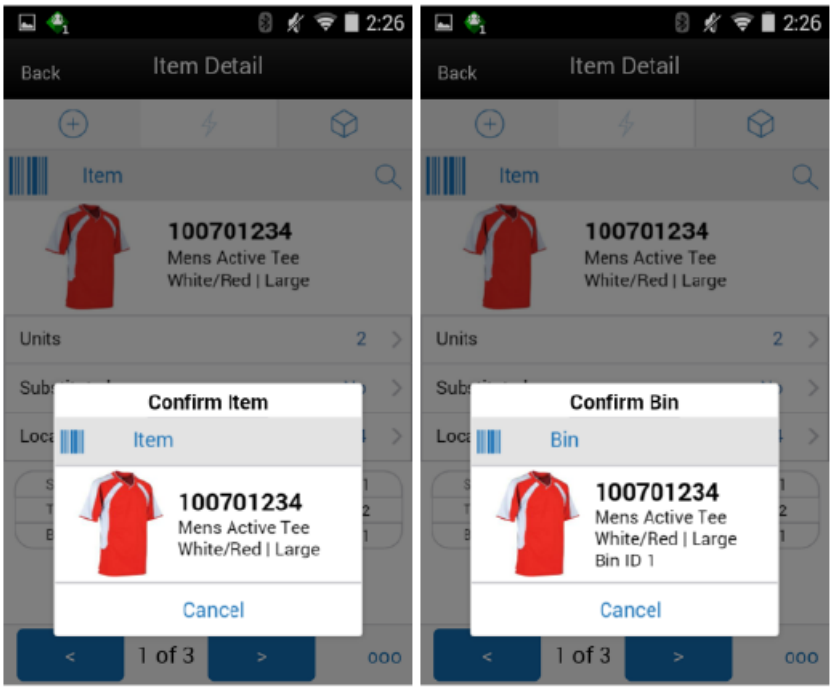
If there is no stock on hand in the backroom or the shopfloor:

- It will display the first backroom location.
- If no backroom location, the first shopfloor location is displayed.
- If no shopfloor location, it displays no location.

The screen has arrows on the bottom that will prompt the user to the next item on the pick.

Confirm Item/Confirm Bin

Figure 12-18 Confirm Item/Confirm Bin Popup



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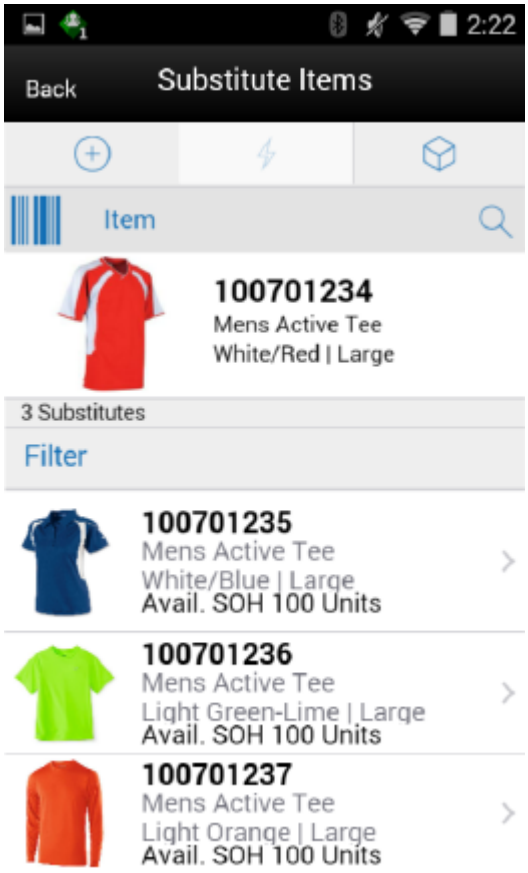
After editing the pick quantity the user will be required to confirm the item in the **Confirm Item** popup. This is to validate the proper item is being picked.

For picks that are by bin, the user also needs to validate that the items are being placed into the proper bin. When entering or scanning an item or editing the pick quantity, the user will be directed to the **Confirm Bin** popup to scan the bin for the item.

> **Note**
>
> The confirm bin will occur after the Confirm Item (if applicable).

Substitute Items

Figure 12-19 Substitute Items Screen

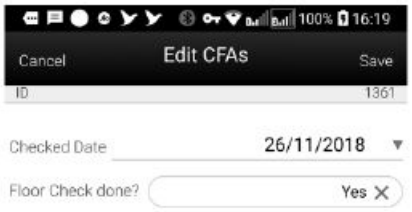


The Substitute Items screen is accessed by selecting the Substituted field on the Item Detail (Picking) screen. This screen will list all of the available substitute items for the item being picked (if there are any). If the **Item Substitution - Store Discretion** equals **Yes**, the user does not have to use one of the items in the list, and can also enter/scan an item for substitution. It will be added to the pick as well as to the **Substitute Items** list. If the user does not have store discretion, only items from the list can be selected.

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Edit CFAs Screen

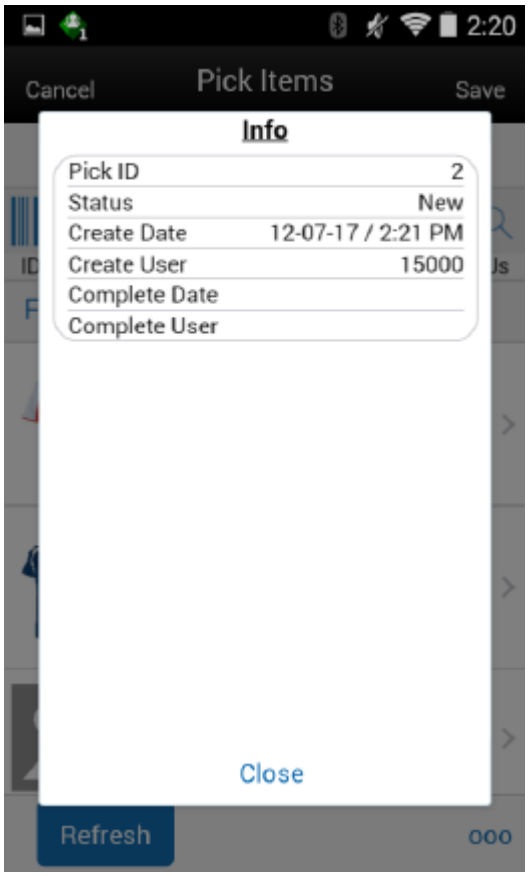
Figure 12-20 Edit CFAs Screen



The Edit CFAs screen displays the list of CFAs (flexible attributes) that have been set up for Customer Order Picking, in the desktop application and lets the user enter values for them. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed for entering CFA values.

Info (Picking)

Figure 12-21 Info Pick Items Screen



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The info screen is an informational popup that contains read-only information about the header level of the customer order pick. It is accessed through the Info menu option in the Footer menu on the Pick Items screen. Details include:

- Pick ID
- Status
- Create Date
- Create User
- Complete Date
- Complete User

Customer Order Deliveries

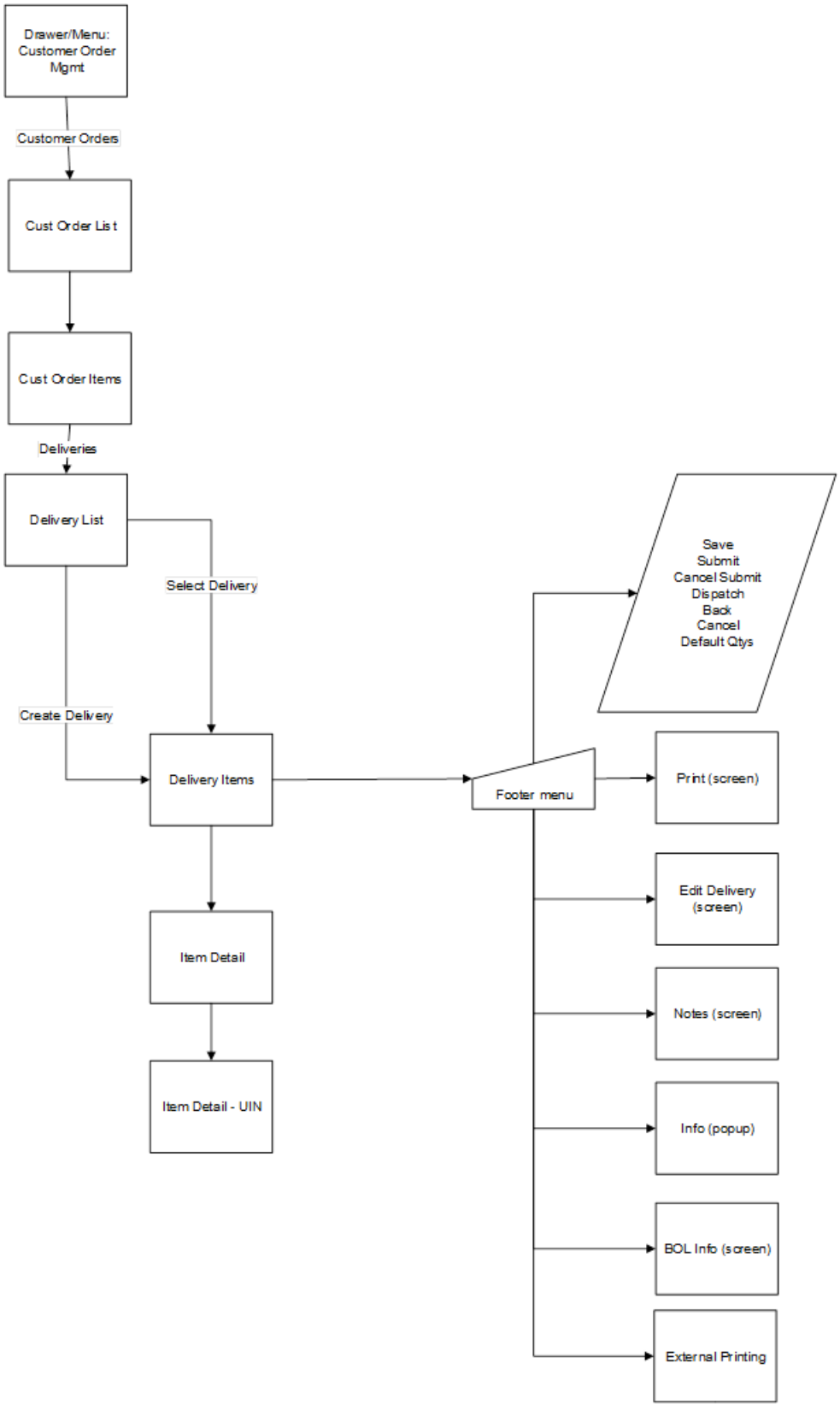
Delivering of a customer order consists of collecting the items that have been picked and then getting them to the customer (shipment or pickup). This might be for a customer pickup or shipping them to the customer.

Features:

- View customer order delivery (web order and non-web orders)
- Edit an existing customer order delivery (web order)
- Delete a customer order delivery (web order)
- Print a customer order delivery
- Create a customer order delivery (web order)

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Figure 12-22 Customer Order Delivery Screen Flow

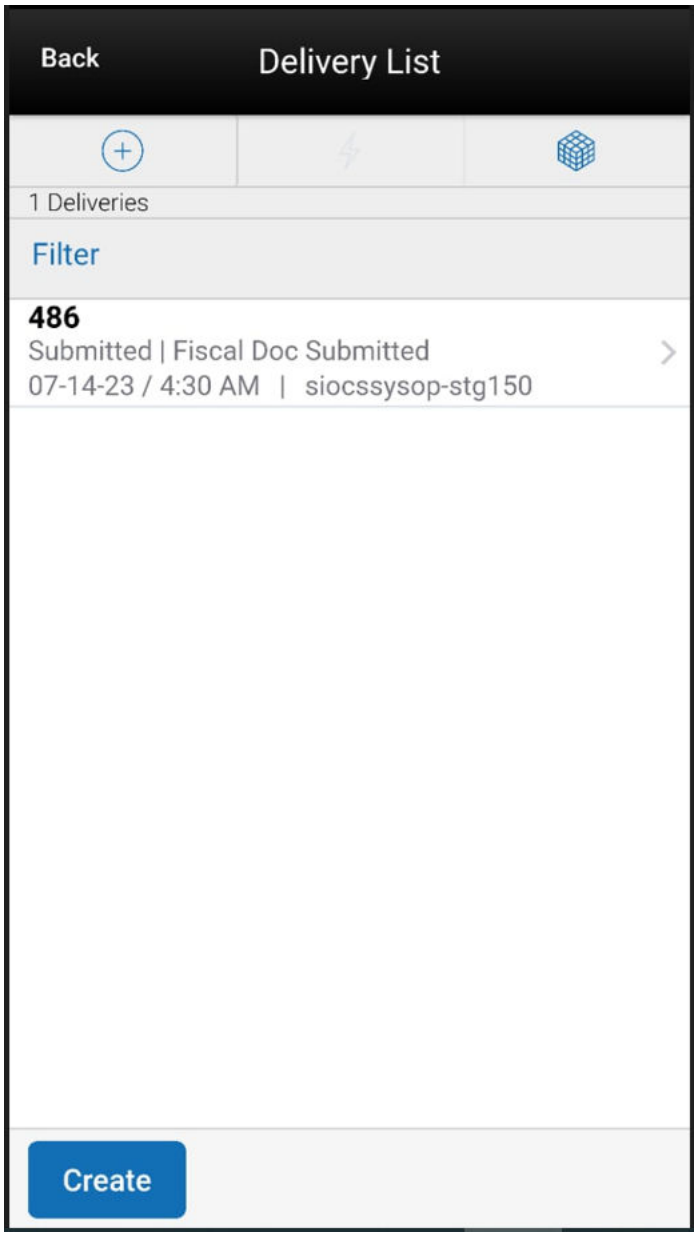


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Customer order deliveries will be accessed from the **Customer Order** dialog on the **Cust Order Items** footer menu. Customer order deliveries can be created and edited for web order types, non web orders can only be viewed and are fulfilled through the POS system. Customer order deliveries will allow for viewing, creating, editing, saving, submitting, dispatching, printing, BOL, and deleting customer order deliveries

Delivery List

Figure 12-23 Delivery List Screen



The Delivery List screen is accessed by selecting the **Delivery** menu option within the footer menu of a specific customer order. The screen will display all of the customer orders delivery for the specific customer order delivery. The deliveries displayed may be for web orders that were created within the system, a third-party system such as POS, or they may be for POS on holds and layaways.

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Since there will never be a large number of deliveries for a specific customer order, there is no search criteria screen. There is however a filter bar, which allows for filtering by: delivery ID, status, date, and user. Selecting a delivery will navigate to the details for the customer order delivery. The **Create** button will attempt to create the delivery and navigate to the Delivery Items screen.

Creating a new delivery is also an option. New Deliveries can only be created for web order customer orders that are not in 'Completed' or 'Cancelled' status, which means there is remaining quantity yet to be fulfilled.

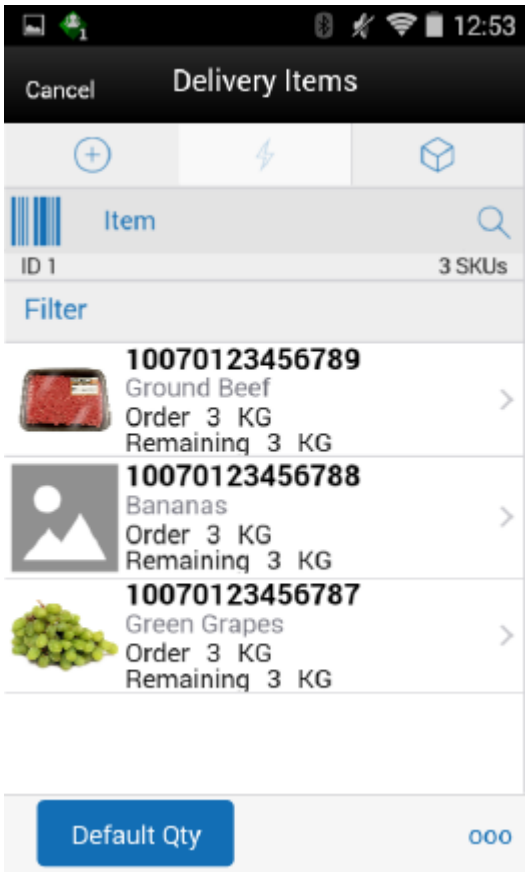
In case the system is configured to require picking, it will validate there are item quantities on the customer order that have been picked which have not yet been delivered prior to creating the delivery. Next, the system will check the **Allow Partial Delivery** indicator which is on the customer order fulfillment order. If this is set to **No**, it means that the entire order must be delivered together. The system would not allow the creation of the delivery unless the entire order has been picked. If picking is not required, the delivery will be created. The **Allow Partial Delivery** indicator will then be validated upon dispatch of the delivery.

Once the system creates the delivery, the delivery will consist of all of the items that were auto populated from the customer order fulfillment order including substitutes.

This screen gives a quick view of the list of deliveries for the customer order along with the details such as delivery ID, status, status of the Fiscal Doc/E-way bill request(if the system is configured to use Fiscal Doc ID/E-way Bill ID), etc.

Delivery Items

Figure 12-24 Delivery Items Screen



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The Delivery Items screen is accessed by selecting an existing Delivery from the Delivery List screen, or by creating a new delivery. Delivery Items displays all of the items on the delivery including the order and remaining quantities.

Selecting an item will navigate to the Item Detail (Customer Order Deliveries) screen for that item. Scanning an item will also navigate to the **Item Detail** screen for that item and the quantity may be updated per the quantity scanned. If the item scanned is a UIN item, the user will navigate to the UIN tab within the **Item Detail** screen.

The items are listed in ascending order by item ID. A **Default Qty** button will be displayed in the footer which will default in the delivery quantities on the delivery (non UIN items) to what is remaining to be delivered.

If any item in the customer order has **Customer Order Ship Alone** indicator set to **Yes**, then the system will not allow the user to deliver this item along with other items. Those items will need to be shipped alone.

Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Delivery Items screen. The menu functions will include the following:

Info: Info will access the Info popup.

BOL Info: Accesses the BOL Info popup.

Notes: The Notes option accesses the notes common dialog to capture notes. The note will be saved on the customer order and not the delivery.

Default Qty: Default Qty will default in the delivery quantity to what is remaining.

Edit CFAs: This option takes the user to Edit CFAs screen to enter values for the CFAs that are set up for Customer Order Delivery.

Edit Delivery: Displays the **Edit Delivery** popup to edit header level information on the delivery.

Refresh: Refreshes the delivery by getting the most current customer order/fulfillment order information. There may be other picks or deliveries that have occurred in the time the delivery was originally created.

Cancel Submit: Sets a submitted status delivery back to **In Progress**.

Dispatch: Dispatch will check if **Allow Partial Indicator** is set to **No**, it will validate that the entire order is being delivered together. If not, the system will restrict the user from dispatching. Those users with certain privileges will be able to override this and it will be a warning. If Allow Partial Indicator is set to Yes, the customer order can be delivered partially. If system parameter 'Customer Order Fulfillment Restriction' is set to 'Line Controlled' and Allow Partial Indicator is set to Yes, if an item is getting delivered then it has to be delivered fully. Partial delivery of an item is not allowed. Also, if the store parameter **Manifest Customer Order Deliveries** is set to **No** and system parameter **Tracking ID Required** is set to **Yes**, the system should check if the Tracking ID has been captured or not, if not captured, an error message will be displayed. Upon dispatch of the delivery the delivery will move to **Completed** status, and user returns to the Delivery List screen. The stock on hand and customer order reserved quantities will be decremented by the delivered quantities. The customer order fulfillment order will have the delivered and remaining quantity updated. If the entire customer order has been fulfilled, meaning there is no remaining quantity, the customer order will be set to **Completed** status. If the system is enabled to obtain Fiscal Doc ID/E-way bill ID as part of the shipping process, the delivery cannot be dispatched until the Fiscal Doc ID/E-way bill ID is available.

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The exception is when the user has ‘Allow dispatch without Fiscal Document ID’ security permission.

Submit: Submit will submit the delivery and set it to **Submitted** status. Submit is only available when store configured for **Dispatch Validate to Ship Submit**. Submitting will set the delivery to a **Submitted** status and not allow for edits, since there are no updates to inventory at this point. The only step possible will be to cancel Submit or Dispatch. When the system is configured for **Ship Direct**, submitting is not possible. Submit will check if Allow Partial Indicator is set to No, it will validate that the entire order is being delivered together. If not, the system will restrict the user from submitting. Those users with certain privileges will be able to override this and it will be a warning. If Allow Partial Indicator is set to Yes, the customer order can be delivered partially. If system parameter 'Customer Order Fulfillment Restriction' is set to 'Line Controlled' and Allow Partial Indicator is set to Yes, if an item is getting delivered then it has to be delivered fully. Partial delivery of an item is not allowed. If the store parameter **Manifest Customer Order Deliveries** is set to **No** and system parameter **Tracking ID Required** is set to **Yes**, the system should check if the Tracking ID has been captured or not, if not captured, an error message will be displayed. If the system is enabled to obtain Fiscal Doc ID/E-way bill ID for the shipment, the process to request the E*waybill starts once the shipment is submitted.

Save: Saves the delivery as **In Progress** status and return to the Delivery List screen.

Delete: Deletion of an **In Progress** status delivery and move it to **Canceled** status. User will return to the Delivery List screen.

Back: Back is only applicable to view only deliveries and will exit to the Delivery List screen.

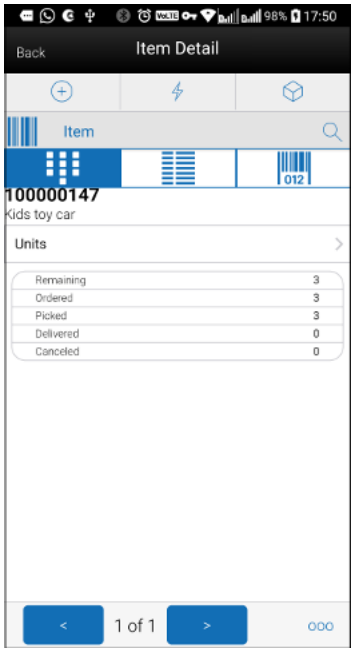
Cancel: Exits to the Delivery List screen and no changes will be saved.

External Printing: Displays the external printing dialog to select a printer for pre-shipment or manifesting.

Print: Print will display the common print dialog to print the customer order delivery report.

Item Detail (Customer Order Deliveries)

Figure 12-25 Item Detail (Customer Order Deliveries) Screen



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The Item Detail screen contains the details for the specific item on the customer order delivery. Entering/scanning an item on this screen will refresh the screen and update item and the delivery quantity for the item. If the item scanned is a UIN item, the user will automatically navigate to the UIN tab within the Item Detail screen for the item.

The delivery quantity, represented by the field on the top of the screen with the UOM label is editable by the user and represents how many of this item is being delivered. Editing the quantity is controlled by security. Users will enter in the quantity to be delivered. If picking is required, the quantity will not be allowed to exceed the pick quantity. If picking is not required, the quantity cannot exceed the remaining quantity.

If the item has **Customer Order Ship Alone** indicator set to **Yes**, then the system will not allow the user to deliver this item along with other items. Those items will need to be shipped alone.

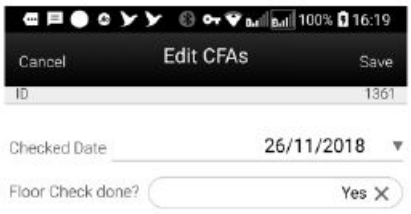
The pack size will be displayed if the UOM is set to cases. The remaining, order, picked, delivered and canceled quantities for the customer order will be displayed. Lastly, if the item is a substitute for another item, the **Substitute For** field will display with the original item listed.

The Item Detail has a UIN tab to take user to the UIN screen to add/remove UINs for UIN items (if system is configured to use UINs and if the item is a UIN item).

There is an **Extended Attributes** tab that enables the user to view/capture Extended Attributes for the item. If the item is not configured to capture extended attributes or there are no extended attributes captured, the list will be empty.

Edit CFAs Screen

Figure 12-26 Edit CFAs Screen

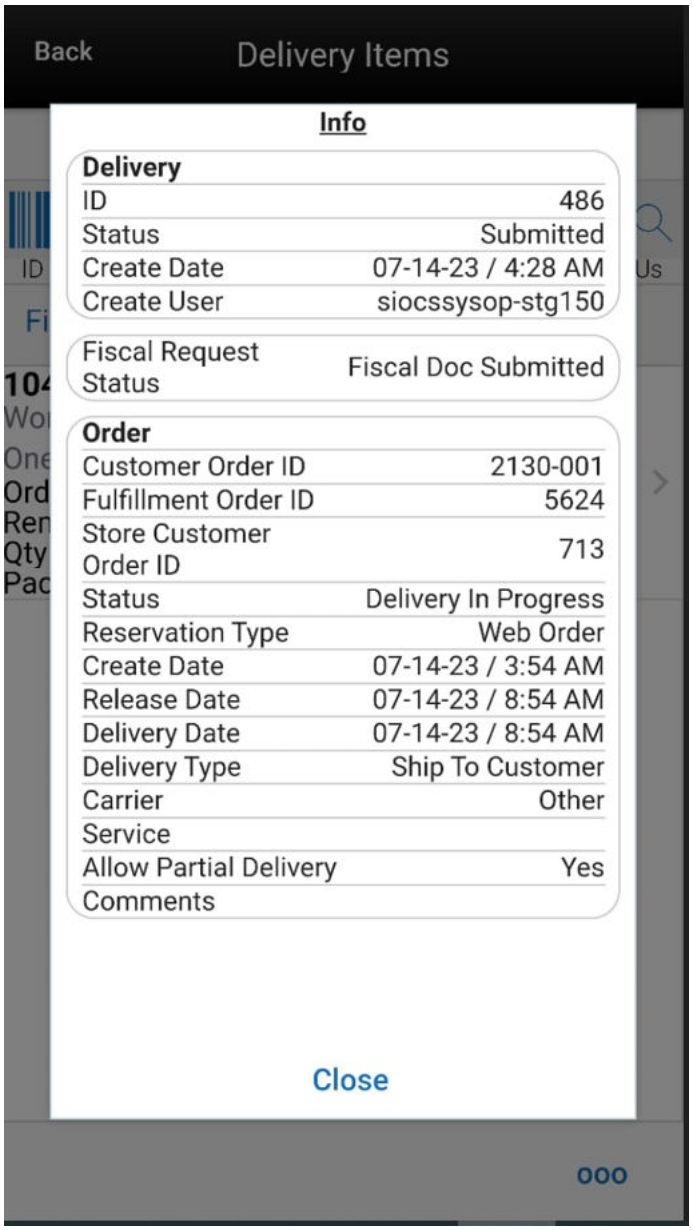


The Edit CFAs screen displays the list of CFAs (flexible attributes) that have been set up for Customer Order Delivery, in the desktop application and lets the user enter values for them. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed for entering CFA values.

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Info (Customer Order Deliveries)

Figure 12-27 Info (Customer Order Deliveries) Popup



The Info popup contains read-only information about the header level of the customer order delivery. It is accessed through the Info menu option in the Footer menu on the Delivery Items screen. Delivery details include:

- ID
- Status
- Create Date
- Create User

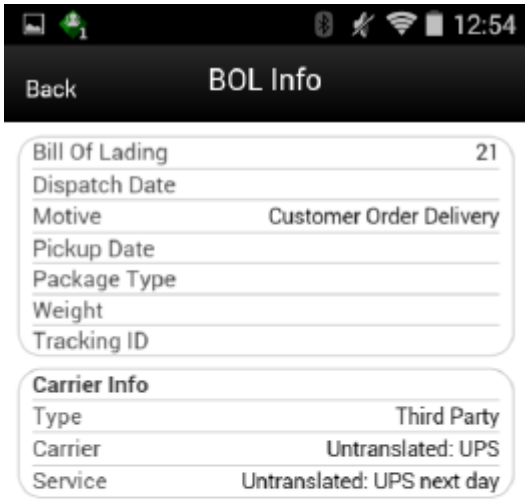
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Order details include:

- Customer Order ID
- Fulfillment Order ID
- Store Customer Order ID
- Status
- Reservation Type
- Create /Release/Delivery Date
- Delivery Type
- Carrier
- Service
- Allow Partial Delivery
- Comments
- Fiscal Request ID, Fiscal Request Status, Fiscal Request Status, Reject Reason, Fiscal Doc ID, Fiscal Doc Link, if the retailer has been using Fiscal Document ID/E-way bill ID in the shipment process.

BOL Info

Figure 12-28 BOL Info Screen



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The BOL Info screen contains read-only information about the Bill of Lading (BOL) for the customer order delivery. It is accessed through the **BOL Info** menu option in the Footer menu on the Delivery Items screen. Fields include:

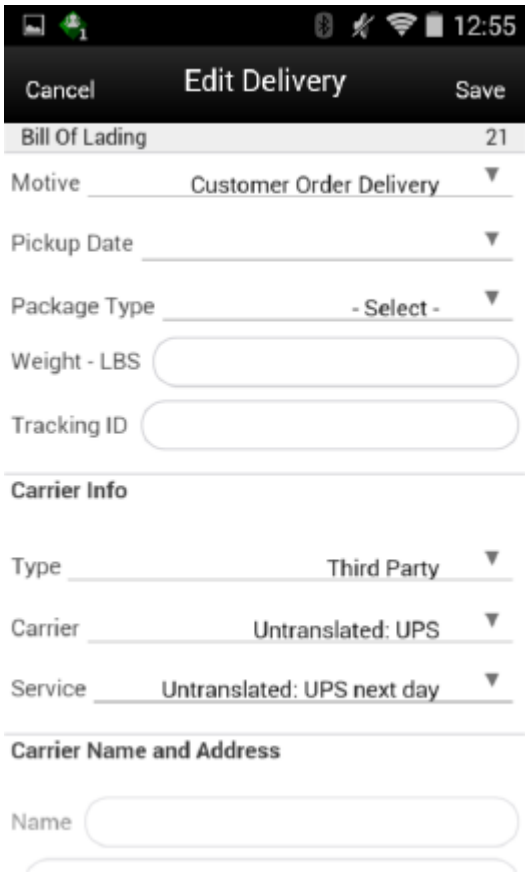
- Bill of Lading
- Dispatch Date
- Motive
- Pickup Date
- Package Type
- Weight
- Tracking ID
- Ship to Address
- Carrier Type
- Carrier
- Service
- Carrier Name and Address

The **Ship From** section is populated with the information of the sending store. If **Ship To** details exist, a **Ship To** button will be displayed. Selecting **Ship To** will display the **Ship To** details which is the information of the customer.

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Edit Delivery

Figure 12-29 Edit Delivery Screen



This is the Edit Delivery screen for Customer Order Deliveries. It allows the user to edit details on the Customer Order Delivery or BOL. It is accessed when selecting the Edit Delivery menu option from the Footer menu on Delivery Items. The Edit Delivery option is only editable when the delivery is in an editable status. The user must have proper permission to access this screen. Fields for edit include:

- Motive
- Pickup Date
- Package Type
- Weight
- Tracking ID
- Carrier Type
- Carrier
- Service
- Carrier Name and Address

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If the carrier is on the customer order, the carrier type will be defaulted to third party and the carrier will be populated from the customer order. If there is no carrier on the customer order, the type will default to the sender for shipments and receiver for pick-ups.

The Service, example 2 day, next day, and so on, are defaulted from the customer order. They are not required. For additional details on BOL, Manifesting, and pre-shipment, see Shipping and Receiving Common Components.

- The screen also enables the user to specify details such as vehicle number and country, driver name and License number, if the retailer has been using Fiscal Document ID/E-way bill ID in the shipment process.

Customer Order Reverse Picks

Canceling of customer orders can come in from an external system, such as an Order Management System. When this happens, a reverse pick list will be generated. If there are items that physically need to be un-picked, the user will action the reverse pick list which will then take the items that were canceled and move the picked quantities back to the appropriate area in the store. If the items that are being canceled are not picked, then the system generated reverse pick will just be created in a **Completed** status with no action required through the application.

A system-generated reverse pick may get created if the user rejects an open customer order.

A manual reverse pick might also be necessary. This happens when the user discovers that something which was picked has to be unpicked, maybe because it has been damaged. The manual reverse pick will reverse the pick quantities.

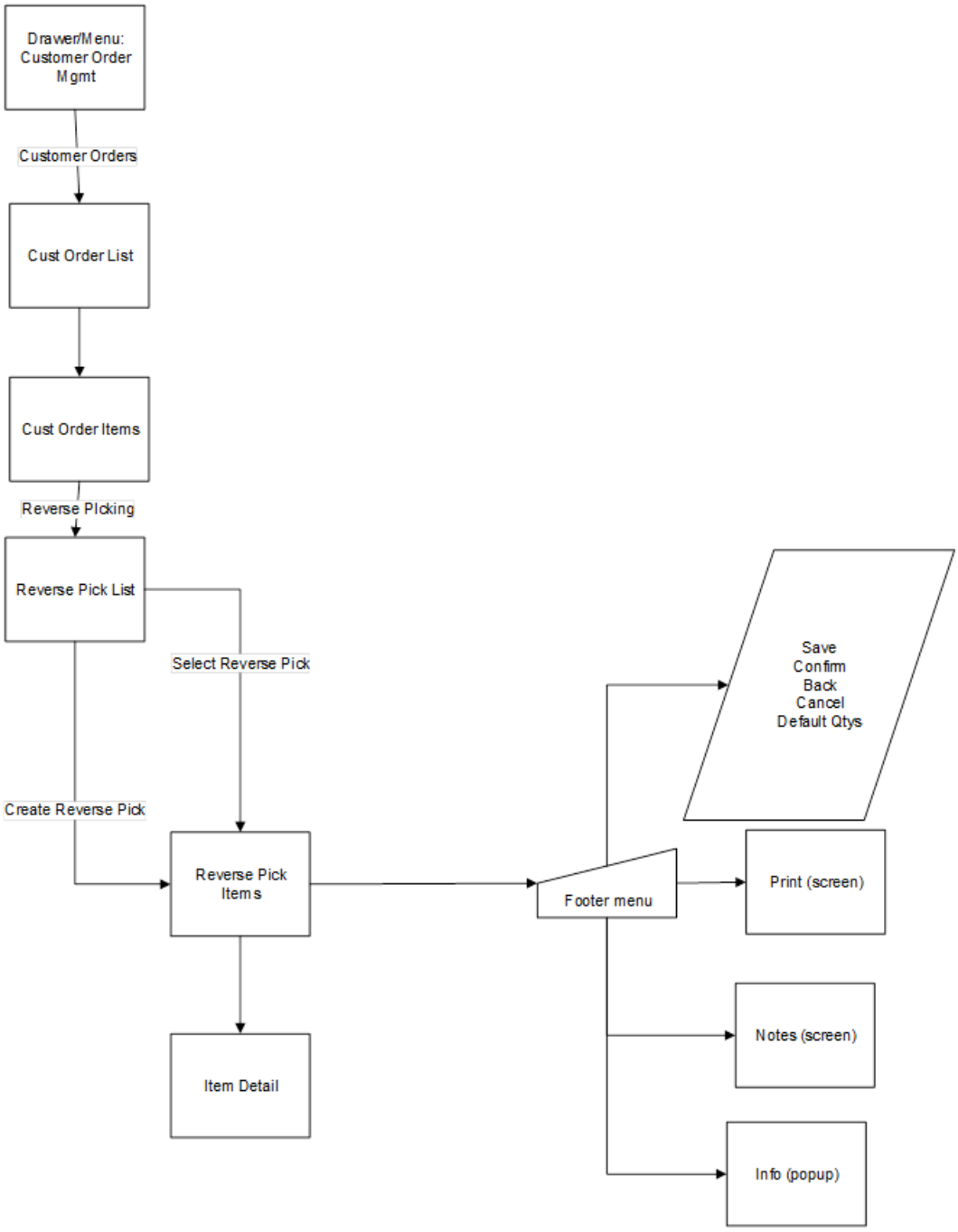
Note that reverse picking and canceling is more of an exception process.

Features:

- View customer order reverse picks
- Edit an existing customer order reverse pick
- Delete a customer order reverse pick
- Print a customer order reverse pick
- Create a customer order reverse pick

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Figure 12-30 Customer Order Reverse Picking Screen Flow

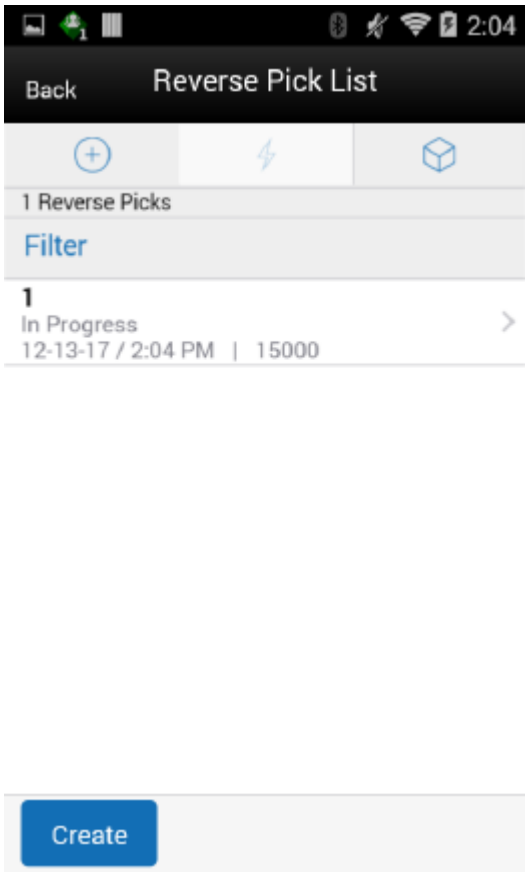


Customer order reverse picking will be accessed from the Customer Order dialog on the Customer Order Items footer menu. Customer order reverse picks can be created and edited for web order types. Customer order reverse picking will allow for viewing, creating, saving, editing, confirming, and deleting of customer order reverse picks.

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Reverse Pick List

Figure 12-31 Customer Order Reverse Pick List Screen



The **Reverse Pick List** screen is accessed by selecting the Reverse Pick menu option within the footer menu of a specific customer order. The list will contain all of the Reverse Picks for the specific Customer Order. The screen will list both externally created system- generated reverse picks as well as manually created reverse picks. Reverse Picks are only for web orders. The Reverse Pick List screen lists reverse pick records for all statuses. This list screen does not have a filter as there normally would not be that many reverse picks for a customer order fulfilment order to filter on.The fields will include the Reverse Pick ID, status, last update date, and user for the reverse pick. A user can navigate to the details of a reverse pick by tapping on a reverse pick record. Finally, the user can create a new manually created reverse pick.

Manual Reverse Pick

- New Reverse Picks can only be created for Web Order customer orders that are in any status except 'New', 'Under Review mode but in New status', 'Completed' or 'Cancelled'. The user might want to create a manual reverse pick because something that was picked might have become damaged and therefore it must be un-picked.
- Before creating a new manual reverse pick, the system needs to perform some validations. The system must be configured for manual or auto picking and if so, then reverse picks can be created. This means that if Reserve on Receiving is set to Yes and Auto Picking is not turned on, then a reverse pick would not be allowed to be created. There must be at

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least one item on the customer order with a physical picked quantity. By physical picked quantity it means a quantity that is still physically sitting there as picked, and it has not been delivered (which means shipped or picked up by the customer). Once the reverse pick is created, it will consist of all the items auto populated from the customer order fulfilment order including the substitute items. The Suggested Reverse Pick Quantity will be set to zero for manual picks. For manual reverse picks, the quantity cannot exceed the physical picked quantity.

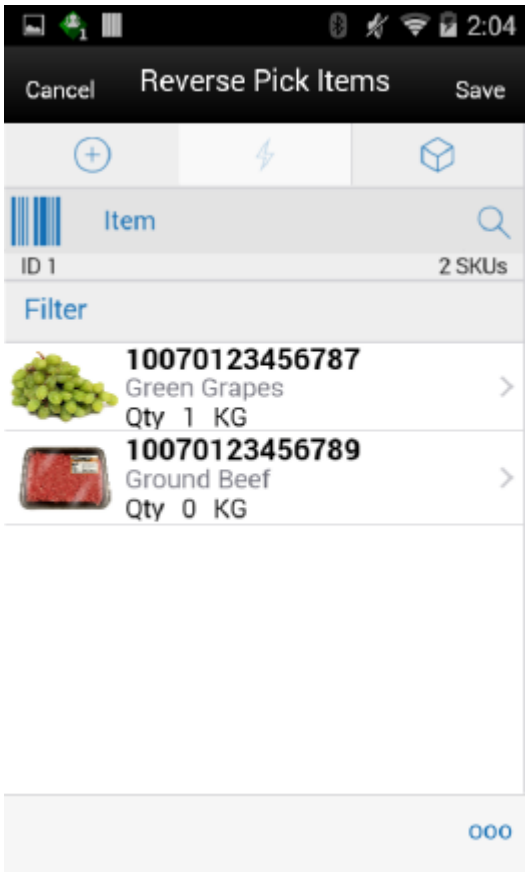
External System-Generated Reverse Pick

- When a system generated reverse pick is created, it will put all items on the reverse pick, including the substitute items. However, only those items that have a suggested quantity will be allowed to be reverse picked. The **Suggested Reverse Pick Quantity** will be populated with what should be reverse picked based upon the cancellation from the external system. For externally system generated reverse picks, the Quantity cannot exceed the remaining quantity or the suggested reverse pick quantity.
- If a cancelation comes into the system that is for more than what is remaining on the order, the cancelation will be rejected and a system-generated reverse pick will not be created.
- When creating the system generated reverse pick, the system will first try and cancel those items that have not been picked. If this quantity is exceeded, it will cancel those items already picked. When all items that are canceled have not been picked, there will not be anything to un-pick and therefore the reverse pick will be auto completed and put into a Completed status and updates will happen to the customer order and inventory as stated below. When some or all items that are canceled are picked, this creates a system-generated reverse pick in New status. This occurs so the user can action it and un-pick the items. Updates will occur upon confirmation of the reverse pick as described below.

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Reverse Pick Items

Figure 12-32 Reverse Pick Items Screen



The Reverse Pick Items screen is accessed by selecting an existing Reverse Pick from the Reverse Pick List screen, or by creating a new Reverse Pick. The Reverse Pick Items display the items in alphanumeric order by item description and the items are determined based upon the following rules:

- Manually created reverse picks will put only the items that:
  - Have a physical pick quantity, meaning they have been physically picked and therefore can be reverse picked.
  - OR, if there is reverse pick qty, meaning one had already been entered by the user on the reverse pick and saved (the PPQ may not exist any longer on the customer order depending on what has happened to the order).
- Externally generated (system) reverse picks will put all items on the reverse pick that have a suggested quantity. Meaning the items that are being canceled by the external system. If the item being canceled has a substitute(s) those will be put on the reverse pick along with the original item.
- All completed and canceled status reverse picks will display all items from the customer order.

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Selecting an item will navigate to the Item Detail screen for that item. Scanning an item will also navigate to the Item Detail screen for that item and the quantity may be updated per the quantity scanned.

Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Reverse Pick Items screen. The menu functions will include the following:

Info: Info will access the Info popup.

Notes: The Notes option accesses the notes common dialog to capture notes. The note will be saved on the customer order.

Default Qty: Default Qty will default in the quantity.

- Manually created reverse picks will default the quantity to the physical pick quantity.
- Externally generated (system) reverse picks will default the quantity to that of the suggested quantity.

Edit CFAs: This option takes the user to Edit CFAs screen to enter values for the CFAs that are set up for Customer Order Reverse Picking.

Confirm: Confirm will complete the Reverse Pick and move it to Completed status.

- For manual reverse picks, the pick quantity on the customer order will be decremented by what was a Reverse picked. The Reserved quantity and the canceled quantity will not get updated as the items are not being canceled on the order, so they need to remain as reserved. They are simply being un-picked.
- For the externally (system) generated reverse picks the pick quantity will be decremented on the customer order. The reserved quantity (if it had been reserved) will be decremented by what was reverse picked and put back to the backroom. The Canceled quantity on the customer order will be incremented by the reverse picked quantity. If all items have been canceled and there have been no deliveries, the status of the customer order will move to Cancelled. If there is no remaining order quantity on the order, and some of the items have been delivered, the customer order will move to Completed status.

Save: Saves the reverse pick as In Progress status and return to the Reverse Pick List screen.

Delete: Delete will allow for deleting of an In Progress status reverse pick and move it to Canceled status. User will return to the Reverse Pick List screen.

Back: Back is only applicable to view only reverse picks and will exit to the Reverse Pick List screen.

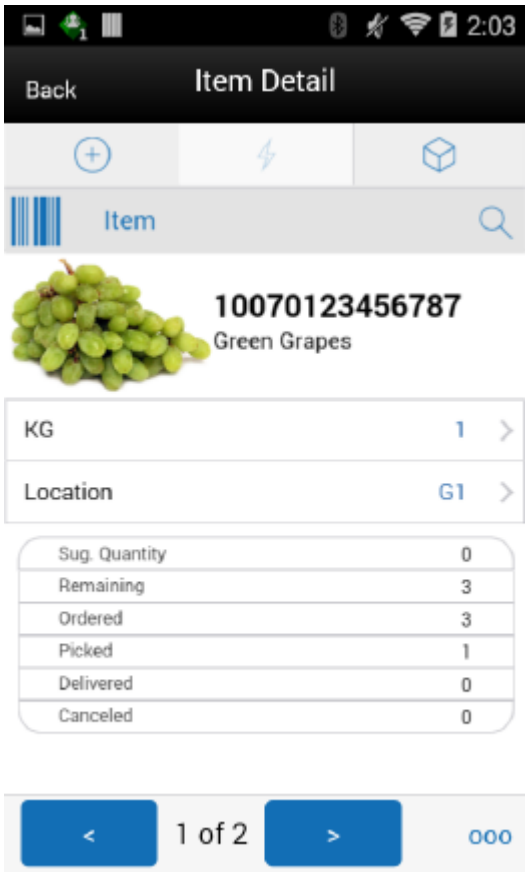
Cancel: Exits to the Reverse Pick List screen and no changes will be saved.

Print: Print will display the common print dialog to print the customer order reverse pick report.

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Item Detail (Customer Order Reverse Picks)

Figure 12-33 Item Detail (Customer Order Reverse Picks) Screen



The **Item Detail** screen contains the details for the specific item on the customer order reverse pick. Entering/scanning an item on this screen will refresh the screen and update item and the reverse pick quantity for the item.

The reverse pick quantity, represented by the field on the top of the screen with the UOM label is editable by the user and represents how many of this item is being reverse picked. Editing the quantity is controlled by security. The suggested quantity will populate with the amount to be reversed for system generated reverse picks. Manually created will have the suggested quantity set to zero.

Users will enter in the quantity to be reverse picked.

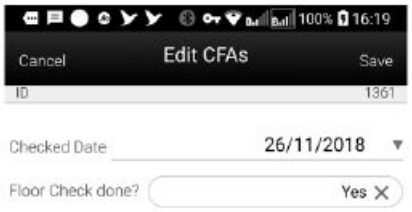
- For manual reverse picks, the user must enter in a quantity less than or equal to the physical pick quantity for the item.
- For system generated (external) reverse picks the quantity must be less than or equal to the suggested quantity for items which are units. It must be less than or equal to the remaining quantity for variable UOM items (that is, Kg, Lbs, and so on).

The pack size will be displayed if the UOM is set to cases. Other fields include remaining, order, picked, delivered and canceled quantities for the customer order will be displayed. Lastly, if the item is a substitute for another item, the Substitute For field will display with the original item listed.

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Edit CFAs Screen

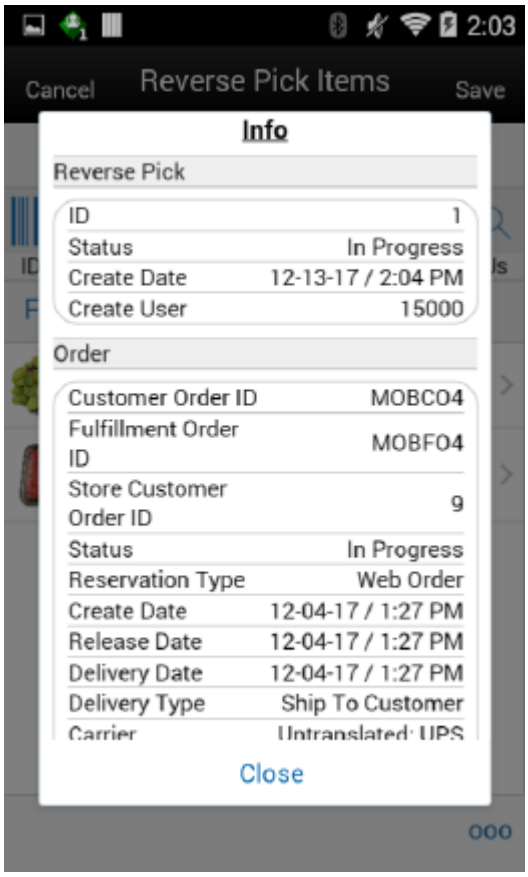
Figure 12-34 Edit CFAs Screen



The Edit CFAs screen displays the list of CFAs (flexible attributes) that have been set up for Customer Order Reverse Pick, in the desktop application and lets the user enter values for them. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them in the desktop application. Appropriate security permission is needed for entering CFA values.

Info (Customer Order Reverse Picks)

Figure 12-35 Customer Order Reverse Picks Info Screen



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The Info popup contains read-only information about the header level of the customer order reverse pick. It is accessed through the Info menu option in the Footer menu on the Reverse Pick Items screen. Reverse Pick details include:

- ID
- Status
- Create Date/User

Order details include:

- Customer Order ID
- Fulfillment Order ID
- Store Customer Order ID
- Status
- Reservation Type
- Create /Release/Delivery Date
- Delivery Type
- Carrier
- Service
- Allow Partial Delivery

Customer Orders JET Mobile Quick Flow

The Customer Order quick flow is a simplified continuous flow for web order type customer orders.

Customer Orders that are executed in the Quick Flow on Jet Mobile are designated as “quick flow” and cannot be continued in the full customer order dialog of MAF. They can be viewed in the full customer order dialog on JET.

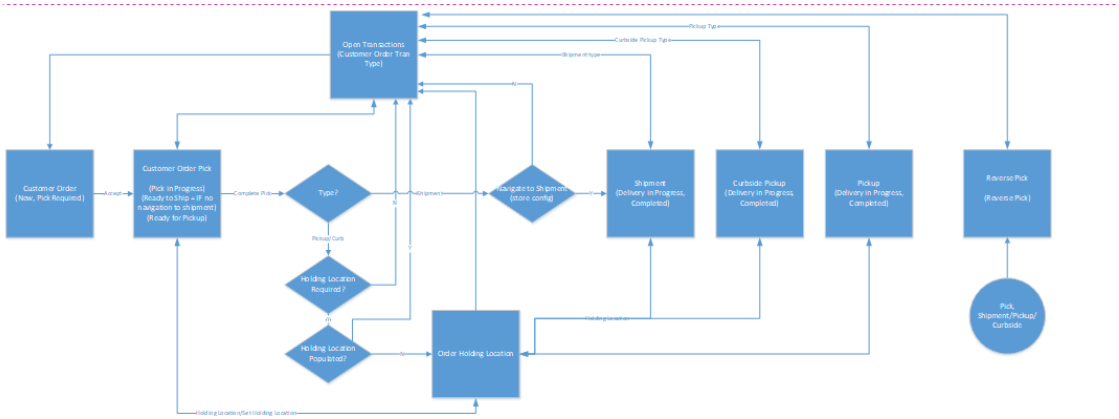
> **Note**
>
> The differentiation between a full flow customer order and a quick flow customer order is defined by the “Customer Order Flow Default” store option that is set at the time a web customer order arrives in the system. POS orders are always considered full flow orders.

- Accept a customer order
- Reject a customer order
- Pick a customer order
- Ship or Pickup a customer order
- Accept a reverse pick
- View customer information
- Print a customer order
- Enter values for CFAs (Custom Flexible Attributes)

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> **Note**
>
> Once a customer order is started in this dialogue it is not possible to complete it in MAF, or vice versa.

Figure 12-36 Customer Order Quick Flow Screen Flow

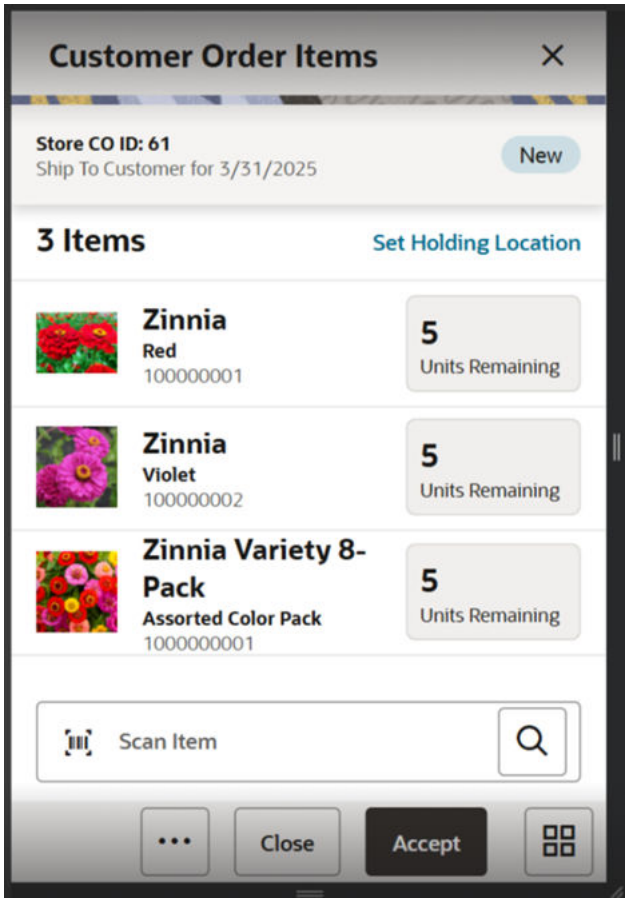


Customer Order Quickflow starts by accessing the web order type customer order in open transactions. A customer order can be accepted, if successful will move the customer order to the Customer Order Pick process. In customer order pick the user can pick the order. A physical holding location may be required to put the items for later pickup. Once picking has been complete the user will move to the shipment/pickup/curbside pickup process dependent on the type of delivery. If a reverse pick exists for the customer order, it will need to be acknowledged to continue the process. At any point the customer order can be rejected which will cancel any quantities which have not yet been picked. Note: Customer Order Quick Flow can also be accessed from Recently Edited and navigating to a transaction from Notifications.

Customer Order

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Figure 12-37 Customer Order Items Screen



The Customer Order screen is accessed by selecting a customer order that is a web order in 'New' status from Open Transactions. If the customer order was previously accepted and it was unsuccessful in progressing forward to the picking stage, then 'Picking Required' will also be available. User must have Access Customer Order Quick Flow permission to access this flow and Edit Customer Order Quick Flow to make any updates.

The screen contains header information for the store order ID, delivery type, release date, and status. It lists the items with item ID, description, image (per preferences) location and order quantities for the customer order.

Selecting an item will navigate to the Item Detail screen. Scanning an item will navigate to the Item Detail screen if the user preference "Scan Navigate" is set to 'Yes'.

Footer Menu

Close: will close the screen and no changes are made.

Pick: Pick will be available for 'Picking Required' status customer orders. If successful, the Pick option will generate a pick for the customer order and navigate the user to the Customer Order Pick Items screen for the new pick. All picking rules apply.

Accept: Accept will only be for customer orders of status 'New'.

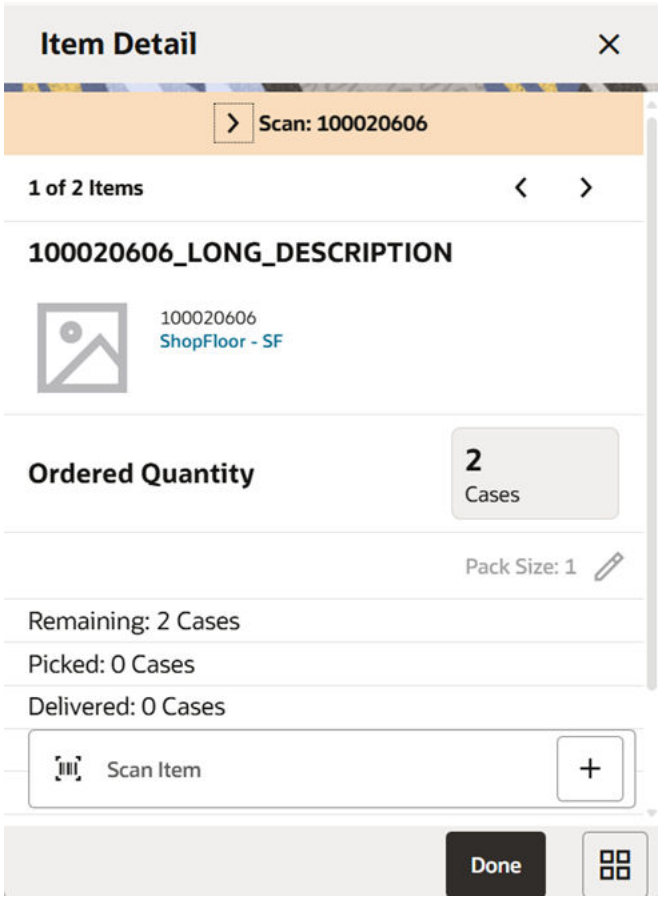
- It will validate the Customer Order Fulfillment Restriction system admin setting
- It will try to create the pick, all picking rules will apply.

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  - If successful, the customer order will be updated to ‘Pick in Progress’ and navigate to the Customer Order Pick Screen.
  - If unsuccessful the customer order will be in ‘Picking Required’ status.
  - It is assumed that picking is required in the Customer Order Quick Flow.
- **Notes:** The Notes option accesses the notes common dialog to capture notes. Notes will always be available for viewing and user can create notes regardless of the status of the customer order, provided the user has Create Notes permission.
- **Print:** Print will display the common print dialog to print the customer order report. Information: Information will access the Customer Order Information popup.
- **Info:** Information will access the Customer Order Information popup.
- **Holding Location:** will prompt the user with the Holding Location popup.
- **Reject:** All item quantities will be canceled/rejected. A system generated reverse pick will be created for the rejected items. Order will be set to ‘canceled’ status.

Item Detail (Customer Orders)

Figure 12-38 Item Detail Screen



The Item Detail screen is accessed by selecting or scanning an item (user preferences is set to Scan Navigate) that is on the customer order on the Customer Order Items screen.

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Scanning or entering an item on this screen will refresh the item detail screen for the item on the customer order. The user can page through the items on the customer order. This screen is view only.

The scan details at the top displays the details of the last scanned barcode.

The item information includes:

- Item ID and description
- Item Image (per user preference)
- Order Line - if the order contains duplicate line numbers
- Location - the location for the item
  - Only displayed if “Display Sequence Fields” is set to ‘Yes’
  - If the item has stock in the backroom, then the first backroom location will be displayed if there is one, otherwise it will display “backroom”.
  - If the item has stock in the shopfloor, then the first shopfloor location will be displayed if there is one, otherwise it will display “shopfloor”.
  - If items have no stock in the backroom or the shopfloor, the first backroom location will be displayed, otherwise the first shopfloor location, and if that doesn’t exit it will display “No Location”.
- Order Quantity
- Pack Size
- Remaining
- Picked
- Delivered
- Canceled
- Last Update
- Comments

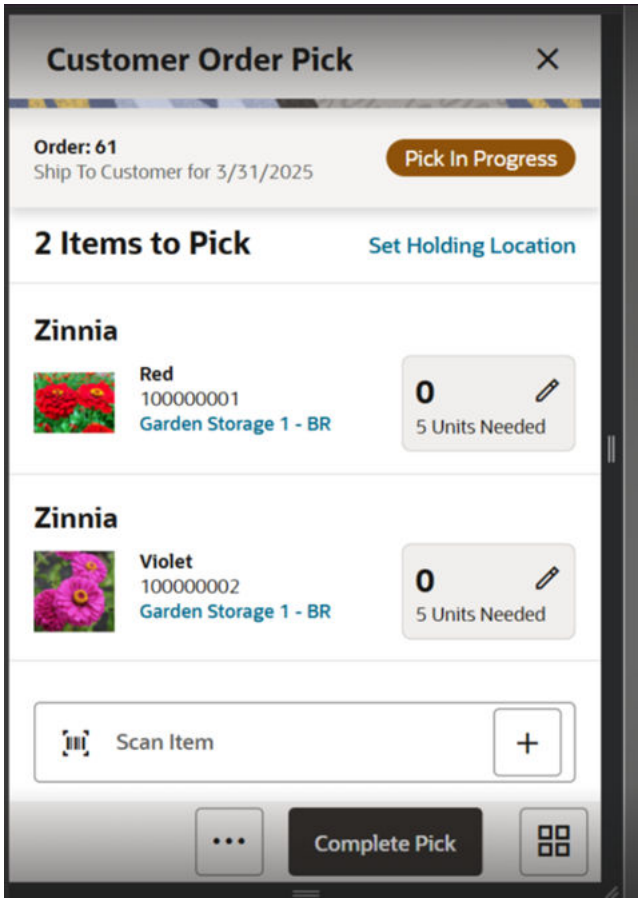
Information (Customer Orders)

See Customer Orders Jet Mobile Full Flow – Information (Customer Orders).

Customer Order Pick

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Figure 12-39 Customer Order Pick Screen



The Customer Order Pick Screen is the next step in the process after the Customer Order screen. It is accessed by successfully creating a pick by selecting the Accept or Pick options for the Customer Order. The Customer Order Pick screen is for customer orders that are in 'Pick in Progress' status as well as for customer orders that are in 'Ready to Ship' and 'Ready to Pickup' status where the delivery record has not been generated yet. Customer Order Picks are accessed automatically within the process flow or from Open Transactions. User must have 'Access Customer Order Quick Flow' user permissions.

The header will contain the Store Customer Order ID, Delivery Type, Release Date and Order Status. The Holding Location can be entered via the link on the top or also from within the overflow menu.

The list will have the items on the customer order with item, description, and image (per preferences).

If Display Sequence Fields equals Yes, the macro location and area for the item will be displayed. If it set to No, this field is not displayed. Note: screenshot above is not showing this.

If there is stock on hand in the backroom:

- It will display the first available backroom location.
- If no backroom location, it will display Backroom.

If there is no stock in the backroom and stock exists in the shopfloor:

- It will display the first available shopfloor location.

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- If there is no shopfloor location, it will display Shopfloor.

If there is no stock on hand in the backroom or the shopfloor:

- It will display the first backroom location.
- If no backroom location, the first shopfloor location is displayed.
- If no shopfloor location, it displays no location.

Items will be ordered by macro locations that have stock on hand with backroom locations first, followed by shopfloor and no location.

If the quantity needed for the item is the suggested pick quantity generated by the system. When the needed quantity has been satisfied a check mark will be displayed. The user can enter in the quantity to pick (Edit Quantity Customer Order Quick Flow permission) or use the scan bar to scan in the quantity.

Footer Menu

Notes: The Notes option accesses the notes common dialog to capture notes. The note will be saved on the customer order and not the pick.

Print: Print will display the common print dialog to print the customer order pick report.

Info: Info will access the Info popup.

Holding Location: will open the Holding Location popup

Reverse Pick: will navigate to Reverse Pick. Only available if customer order is in ‘Reverse Pick’ status.

Reject: All item quantities will be canceled/rejected. A system generated reverse pick will be created for the rejected items. Order will be set to ‘canceled’ status.

Cancel: Exits to the quick flow and no changes will be saved. Save and Exit: Saves the pick as ‘In Progress’ status and exists the quick flow.

Save and Exit: Saves the pick as ‘In Progress’ status and exists the quick flow.

Complete Pick: Completes the pick and moves the pick to Completed status. If there are any unpicked quantities, the user will be prompted to reject them. Only one pick can be created per customer order in the quick flow process.

- If the delivery type is a ‘Customer Pickup’ the system will navigate to Open Transactions and the order will be ‘Ready for Pickup’. If holding location is required per store configuration and the user has not captured it, the system will prompt for this first.
- If the delivery type is ‘Ship to Customer’
  - System will validate store parameter, ‘Navigate to Shipment’.
  - If it is set to ‘Yes’, the system will navigate directly to the Shipment screen and the order will be in ‘Delivery in Progress’
  - If it is set to ‘No’ the system will navigate to the Open Transactions screen and the customer order will be in ‘Ready for Shipment’ status.

Create Shipment / Pickup: This option will be available for customer orders that are in ‘Ready for Pickup’ or ‘Ready for Shipment’ and it will generate the pickup / shipment and navigate to the corresponding screen.

Quantity Validation

Upon confirm, the system will check the system admin, Customer Order Fulfillment Restriction:

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- If it is set to Restricted, the entire customer order must be picked in its entirety.
- If it is set to Line controlled, any item that is getting picked must be picked in its entirety.
- If it is set to Transaction Controlled, no restrictions as above.

Tolerances

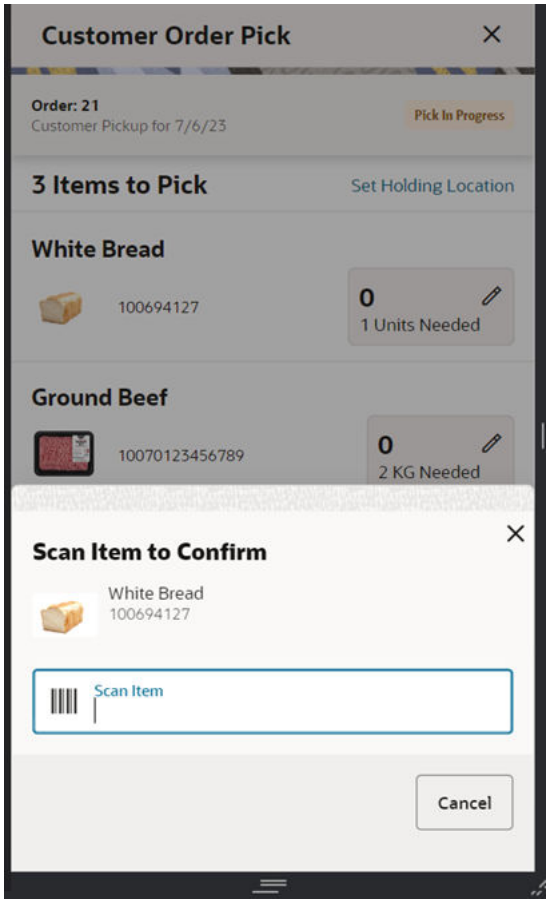
When the item has a variable unit of measure, i.e. Lbs, pounds, it can be difficult to pick the exact amount suggested. For example: picking 2 Lbs of bananas might end up truly being 2.2. The quantity picked may exceed the needed if the defined tolerances are setup to allow for such.

Holding Location

See Customer Orders Jet Mobile Full Flow – Customer Order Picking – Holding Location.

Confirm Item

Figure 12-40 Confirm Item



If the pick quantity is manually entered, rather than scanned, the system will require the user to enter/scan the item to confirm the proper item is being picked. This is not necessary when scanning in the item quantity.

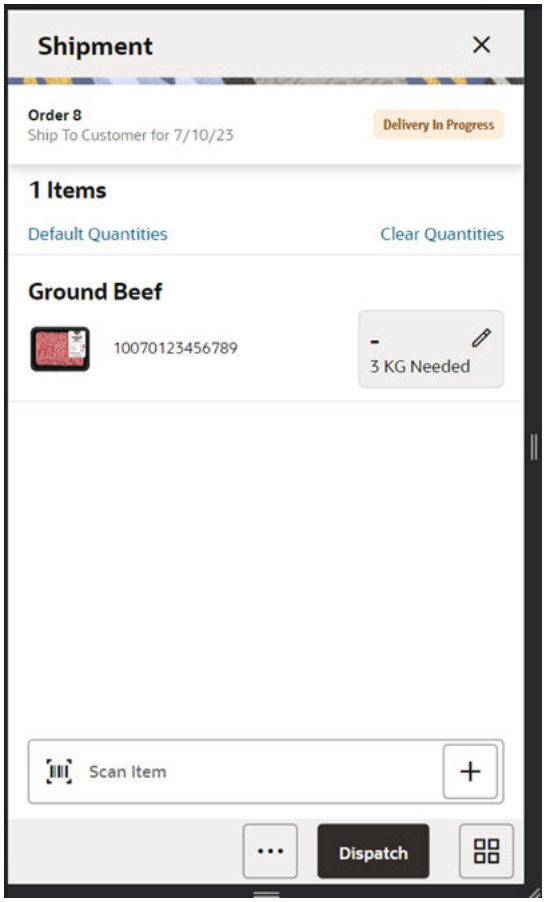
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Information (Picking)

See Customer Orders Jet Mobile Full Flow – Customer Order Picking – Information (Picking).

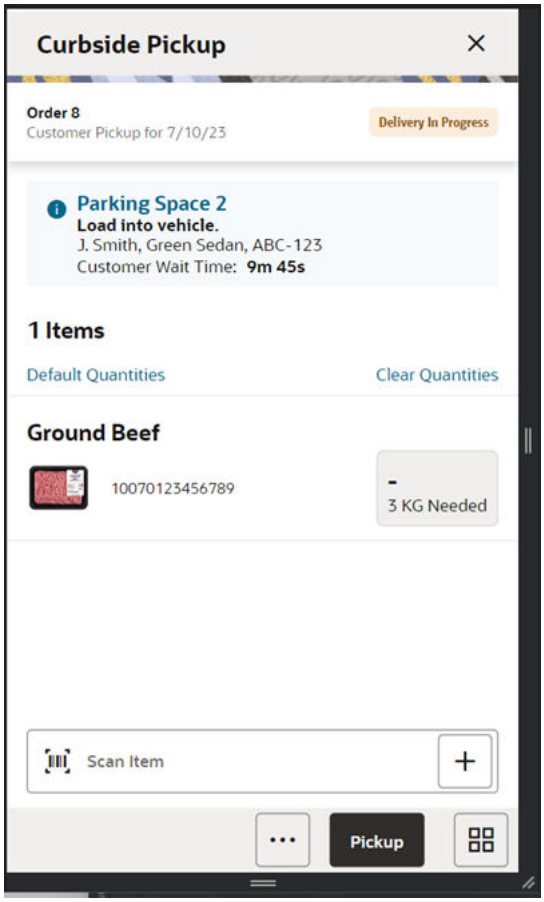
Shipment/Pickup/Curbside

Figure 12-41 Shipment Screen



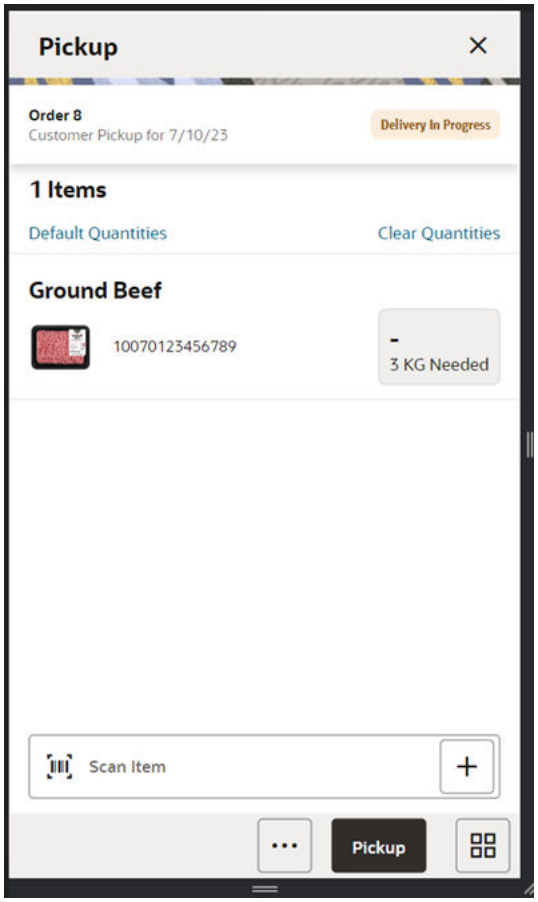
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Figure 12-42 Curbside Pickup Screen



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Figure 12-43 Pickup Screen



The functionality of these screens is the same. The Shipment screen is for delivery types of 'Shipment' it will be accessed from Open Transactions, or if the store configuration, 'Navigate to Shipment' is set to 'Yes', the system will automatically continue on to this screen after completing the pick. The status of the customer order will be 'Delivery in Progress'. The Pickup and Curbside Pickup screens will be accessed from Open Transactions. The status of the customer order will be 'Delivery in Progress'.

Curbside Pickup will contain information in the header about the pickup. It will include the customer's current wait time and any other information that came in on the curbside pickup notification.

The Holding Location (if it exists) will display in the header. A **Default Quantities** option will default in the delivery quantities on the delivery to what is remaining to be delivered. A **Clear Quantities** option is available to clear out the quantities and set them to blank. The items are listed in descending order by item ID. The list will have the items on the customer order with item, description, and image (per preferences).

A UIN icon will be displayed for items that are UIN items when the store is configured to use UINS.

The user can enter in the delivery quantity (Edit Quantity Customer Order Quick Flow permission). Quantity must be less than the Needed quantity, which is the remaining order quantity. Or, if more was picked than what was needed due to tolerances, the delivery quantity must be less than or equal to the picked quantity. If the item is a UIN item, then the quantity

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field will be disabled and selecting the quantity will navigate to the UIN screen to capture UINs. The quantity will be updated per the captured UINS.

If any item in the customer order has **Customer Order Ship Alone** indicator set to **Yes**, then the system will not allow the user to deliver this item along with other items. Those items will need to be shipped alone. This indicator is communicated to SIOCS by the OMS system.

Footer Menu

Notes: The Notes option accesses the notes common dialog to capture notes. The note will be saved on the customer order.

Print: Print will display the common print dialog to print the customer order delivery report.

Info: Info will access the Info popup

Holding Location: will access the Holding Location screen.

Bill of Lading: Accesses the Bill of Lading screen.

Customer: will access the Customer screen.

Cancel Submit: User must have Cancel submit permission. Sets a submitted status delivery back to **In Progress**.

Submit: Submit will submit the delivery and set it to **Submitted** status and not allow for editing. Submit is only available when store configured for **Dispatch Validate to Ship Submit** and when the customer order delivery is in ‘In progress’ status.

- The only step possible will be to cancel Submit or Pickup/Dispatch.
- When the system is configured for **Ship Direct**, submitting is not possible. Reverse Pick: will navigate to Reverse Pick. Only available if customer order is in ‘Reverse Pick’ status.

Reverse Pick: will navigate to Reverse Pick. Only available if customer order is in ‘Reverse Pick’ status.

Reject: All unpicked item quantities will be canceled/rejected. A system generated reverse pick will be created for the rejected items. Cancel: Exits to the screen and no changes will be saved.

Cancel: Exits to the screen and no changes will be saved.

Save: Saves the delivery as **In Progress** status and return to the Open Transactions screen.

Pickup/Dispatch:

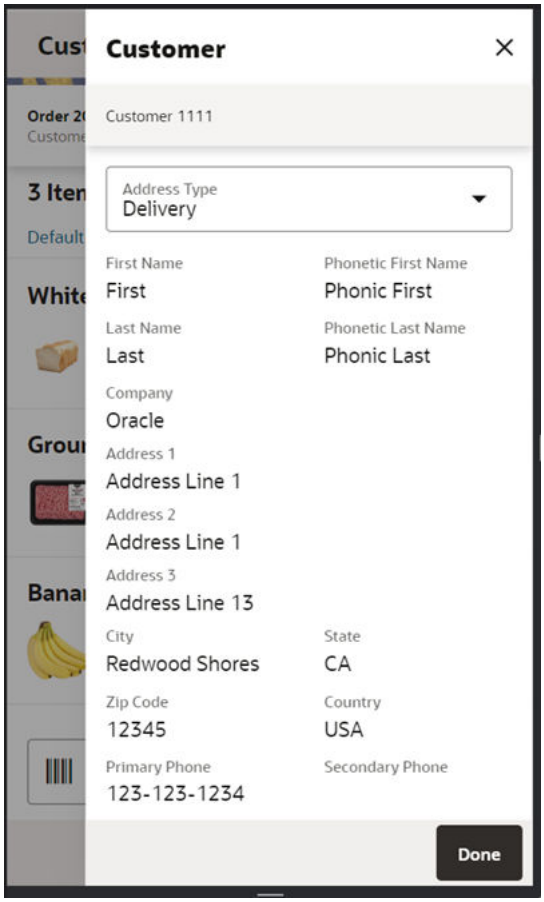
- If Allow Partial Indicator is set to No, it will validate that the entire order is being delivered together. Those users with certain privileges will be able to override this.
- If Allow Partial Indicator is set to Yes, the customer order can be delivered partially.
  - If system parameter 'Customer Order Fulfillment Restriction' is set to 'Line Controlled', the item has to be delivered fully. Partial delivery of an item is not allowed.
- Upon dispatch of the delivery the delivery will move to Completed status, and user returns to the Open Transactions.
- The stock on hand and customer order reserved quantities will be decremented by the delivered quantities.
- The customer order fulfillment order will have the delivered and remaining quantity updated.

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- If the entire customer order has been fulfilled, meaning there is no remaining quantity, the customer order will be set to Completed status.
- Multiple deliveries can be created in the customer order quick flow process, but each delivery needs to be closed before another can be started.

Customer

Figure 12-44 Customer Popup



The Customer screen has read-only information about the customer on the customer order. It is accessed through the Customer menu option in the overflow menu. User must have Access Customer Details permission. Customer information is not held in SIOCS, and it is accessed via a web-service to an external system.

Information (Shipment/Pickup/Curbside)

See Customer Orders Jet Mobile Full Flow – Customer Order Deliveries – Information (Shipment/Pickup/Curbside) .

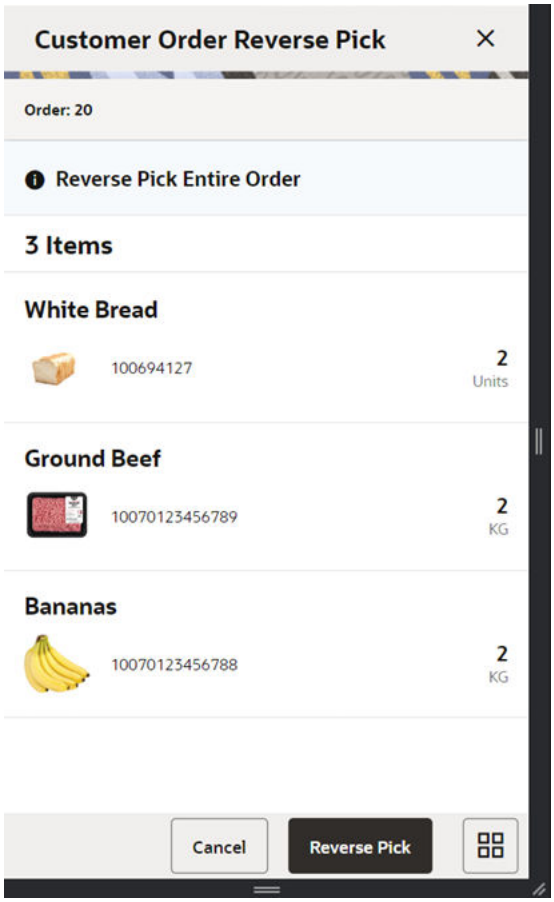
Bill of Lading

See Customer Orders Jet Mobile Full Flow – Customer Order Deliveries – Bill of Lading.

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Reverse Pick

Figure 12-45 Reverse Pick Screen



The Reverse Pick is accessed from Customer Order Pick and Shipment/Pickup/Curbside. Reverse picking is the action of indicating to the OMS that a previous pick is now being unpicked and inventory is moved back to the shopfloor. It also can indicate a confirmation of the cancel request from the OMS. It will be available when the customer order is in Reverse Pick status, a system generated reverse pick exists.

Items will be listed with ID, description, image (if set in preferences), primary location (if Display Sequence Fields = ‘Yes’), and the reverse pick/canceled quantity.

Items will be listed that have been picked and that have a remaining order quantity (meaning they have not been shipped/picked up or canceled). They will be sorted by item description.

The user will be able to select ‘cancel’ to leave without changes. Or, ‘Reverse Pick’ which will move the reverse pick to ‘completed’ status. Customer order picked and reserved quantities are decremented and canceled quantity is incremented.

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Customer Orders JET Mobile Full Flow

The Customer Order full flow is used to execute web order type customer orders that are designated as “Full Flow”. “Quick Flow” customer orders can be searched for and displayed in the list of orders, but accessing a quick order will bring the user to the quick order flow.

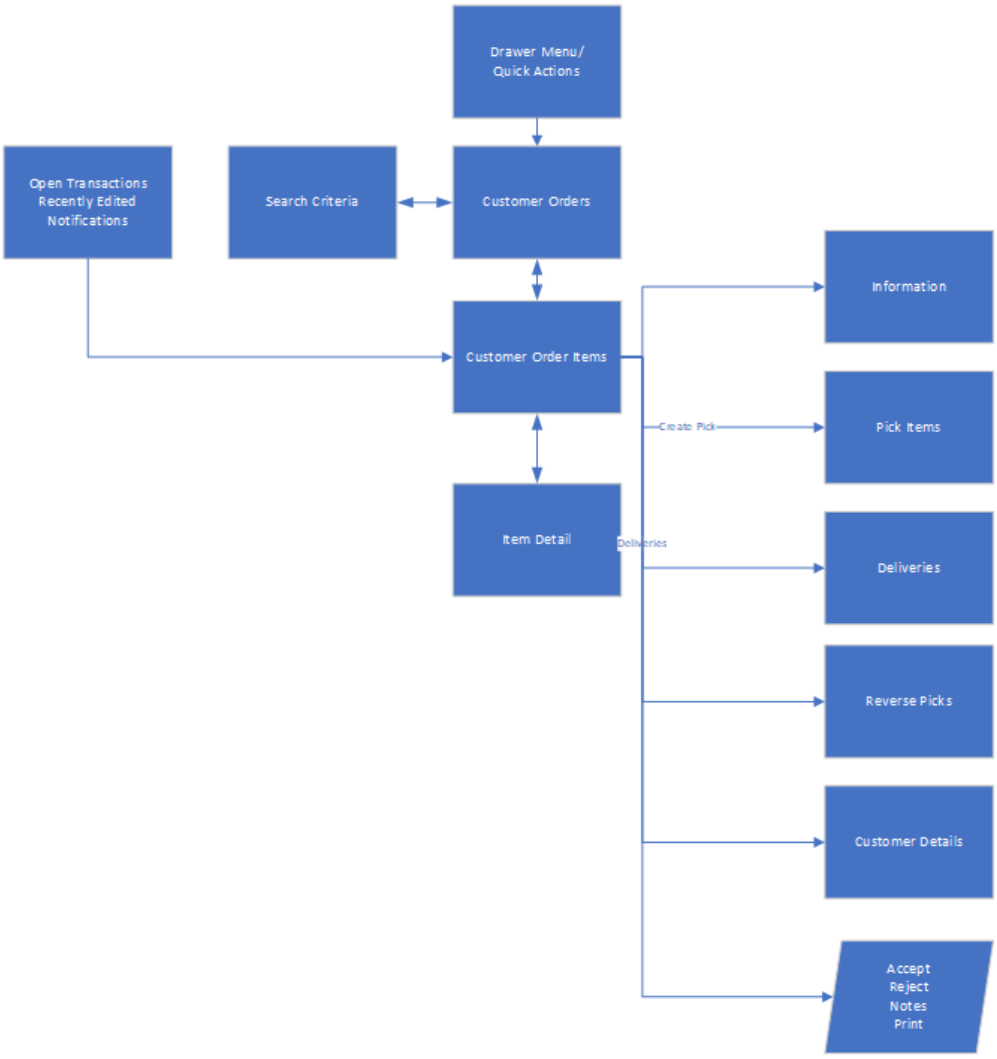
‘Web Orders’ as well as POS Orders, On Hold, and Layaway can be viewed in this dialog.

Features include:

- Search for customer orders
- View an existing customer order
- Accept a customer order
- Reject a customer order
- View customer information
- Pick a customer order by a specific customer order
- Access Shipment or Pickups dialog for a customer order
- Access Reverse Pick dialog for a customer order
- Print a customer order

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Figure 12-46 Customer Order Full Flow Screen Flow

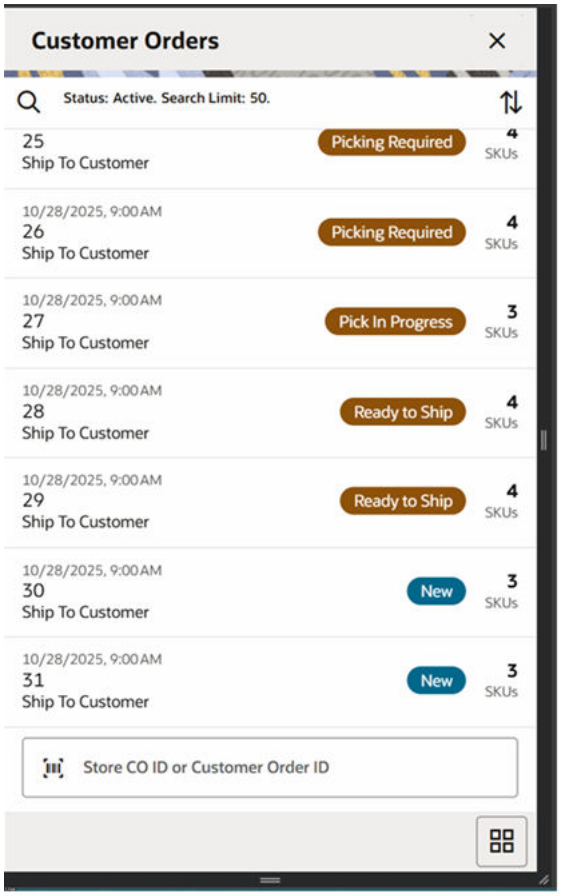


Customer Orders can be viewed, accepted, and rejected. The information and customer details can also be viewed as well as CFAs can be defined. Single order picks can be created from within a customer order. Deliveries and Reverse Picks can be accessed from within the customer order.

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Customer Orders

Figure 12-47 Customer Orders Screen



The **Customer Orders** screen is accessed by selecting the **Customer Order** menu option from within the **Customer Order Management** menu in the drawer/menu. It can also be accessed by selecting Customer Orders within the Quick Actions menu. The user must have permissions.

The screen will display the **Active** status customer orders by default which is all customer orders which are in New, In Progress, Picking Required, Pick In Progress, Reverse Pick, Ready to Ship, Ready for Pickup, Delivery In Progress, Under Review. It also displays orders that are “full flow” and “quick flow”.

The user can click the magnifying glass to direct to the Search Criteria (Customer Orders) screen. Selecting a customer order will navigate to the details for the customer order. If it is a “full flow” order it will navigate into the details for the order in the full flow dialog. If it is a “quick flow” order, it will navigate into the details in the quick flow dialog.

Important Fields include:

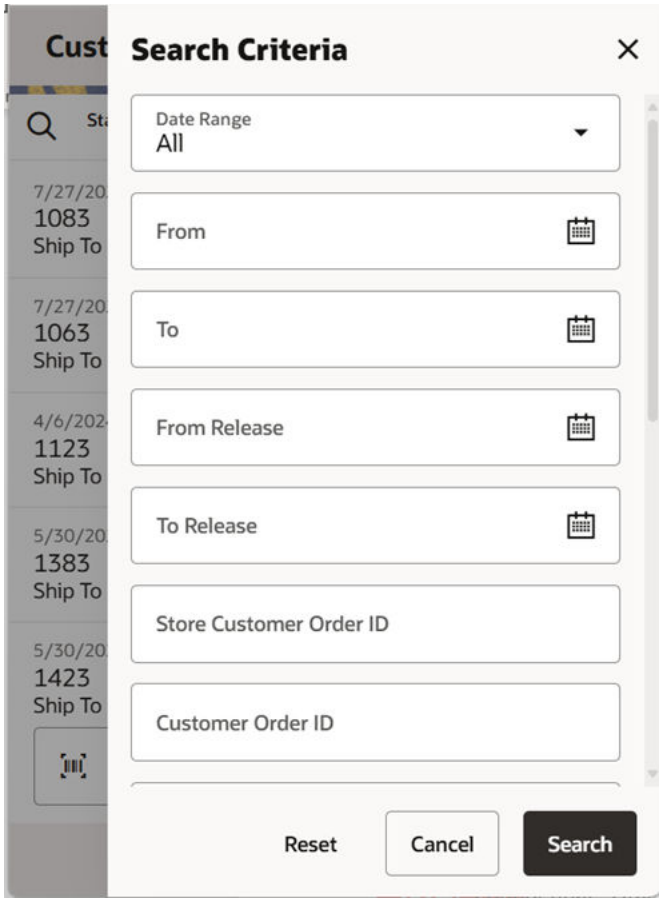
- Release Date – the date the order needs to be ready to leave the store.
- Store Customer Order ID

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- Delivery Type – ‘Ship to Customer’, ‘Customer Pickup’, ‘Layaway’, ‘On Hold’ and ‘POS Order’.
- Status – ‘New’, ‘In Progress’, ‘Picking Required’, ‘Pick In Progress’, ‘Reverse Pick’, ‘Ready to Ship’, ‘Delivery In Progress’, ‘Ready for Pickup’, ‘Under Review’, ‘Completed’, and ‘Canceled’. See section Customer Order Status Flow.
- Number of SKUS

Search Criteria (Customer Orders)

Figure 12-48 Search Criteria Screen (Customer Orders)



The Customer Order Search Criteria screen is accessed by the magnifying glass on the Customer Orders screen. After applying the search criteria, the results will be listed on the Customer Orders screen and the criteria applied will show.

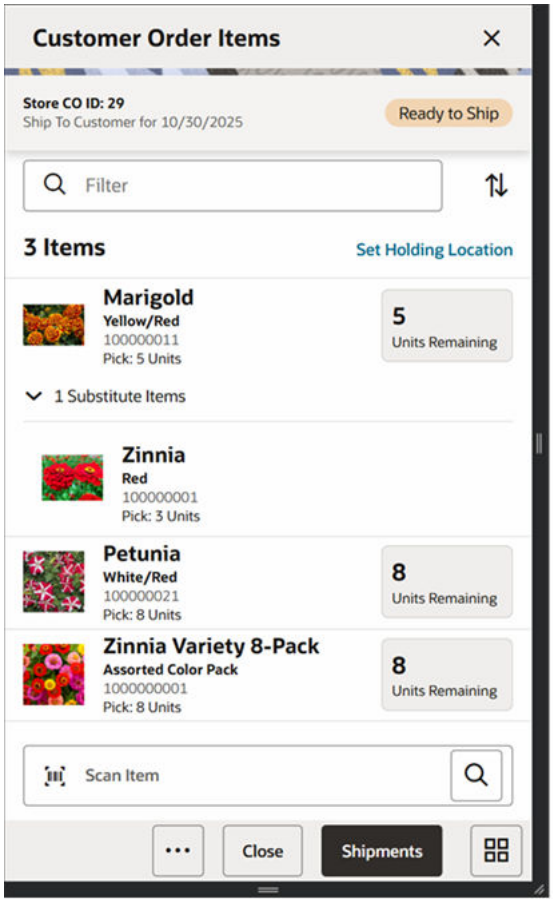
- Date Range
- From/To Release Date
- Store Customer Order ID
- Customer Order ID
- Fulfillment Order ID
- Bin ID

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- Item
- Status
- Reservation Type
- Delivery Type
- Tracking ID
- Search Limit

Customer Order Items

Figure 12-49 Customer Order Items Screen



The Customer Order Items screen is accessed by selecting a customer order from the Customer Orders screen. It is also accessed from Open Transactions, Recently Edited, and from Notifications. A user must have proper permission.

The filter can be used to narrow down the list of items. Filtering can occur by item ID, item description, or UOM. The list can be sorted.

The Holding Location can be defined by selecting the Set Holding Location link. It is also available in the footer menu. Holding Location is not required at this point in the process. See section Holding Location.

Header Fields include:

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- Store CO ID
- Delivery type for Release Date
- Status – of customer order
- Number of items

Item Fields include:

- Item ID
- Item Description
- Item Image – per user preference
- Order Line – if duplicate line items exist
- Pick Quantity
- Pack Size
- Ordered Quantity
- Remaining Quantity
- Substitute Items - If an item has substitute items there will be an expander icon that when selected the substitutes will be displayed.

Selecting a line item will navigate to the item details of that item. Scanning or entering an item in the scan bar will either keep the user on this screen or navigate to the Item Detail (Customer Orders) screen for that item dependent on the Scan Navigate user preference. Items are not added, and quantities are not updated in Customer Orders.

Accept, Pick, or Pickups/Shipments will be the action buttons in the footer bar dependent on the status that the customer order resides in.

The ellipsis in the lower right hand corner will access the Footer menu which will contain all of the functions that can be performed on a customer order.

> **Note**
>
> If the order has duplicate items, meaning an item exists on the customer order more than once, the items will appear multiple times in the list with the corresponding line numbers listed as well. This applies to all screens that display the item within customer orders, customer order picking, customer order deliveries, and customer order reverse picking.

Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Customer Order Items screen. The menu functions will include the following.

Notes: will access the notes common dialog to capture notes. Notes will always be available for viewing and user can create notes regardless of the status of the customer order, provided the user has Create Notes permission.

Print: will display the common print dialog to print the customer order report.

Info: will access the Information popup.

Back: will return to the Customer Orders screen, no changes made to status.

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Customer: will display the customer information popup for the customer order, view only. The user must have proper permission. This uses a web service call to access the customer information.

Holding Location: will access the Holding Location popup.

Pick: will be available for ‘Web Orders’ that are still in an open state. The user must have Create Customer Order Pick permission. Selecting the pick option will generate a pick for the customer order and navigate the user to the Customer Order Pick Items screen for the new pick. If picking by Area is configured for the store, the user will navigate to the Create Pick popup to select an Area first. All picking rules apply. See section Customer Order Picking.

Reverse Pick: will be available for all status of ‘Web Orders’. The user must have the Access Customer Order Reverse Pick permission. The user will navigate to the Reverse Picks screen for the current customer order.

Shipments/Pickups: will be available for all status of customer orders (web orders, customer pickup, layaway, POS order, On Hold). The name of the button, shipments or pickups, is determined by the delivery type. This option navigates to the Delivery dialog for the current customer order. The user must have Access Customer Order Delivery permission. See section Customer Order Deliveries.

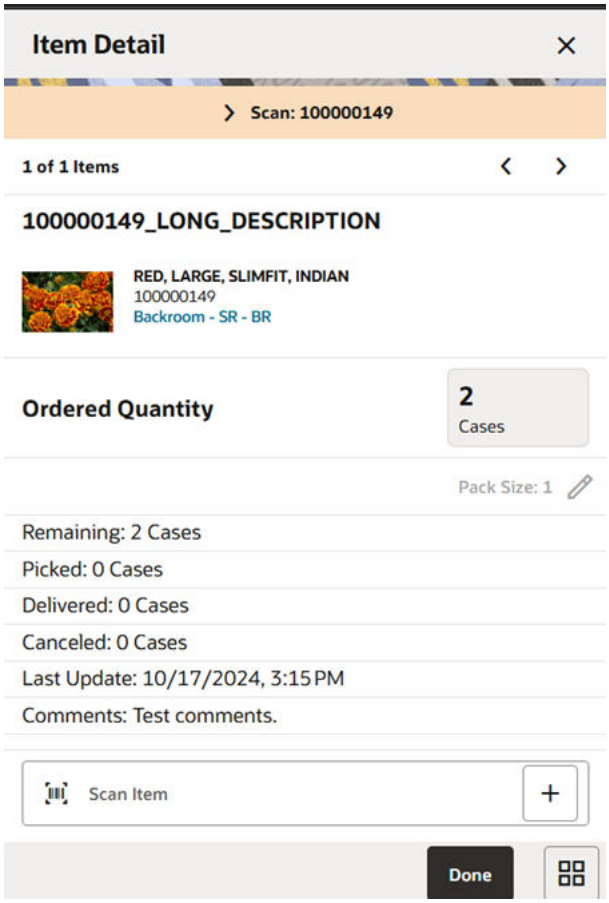
Accept: will only be available for ‘web order types’ of customer orders of status 'New' or 'New but in Under Review mode' . The status of the customer order will update as follows: if the store is configured for picking to be required, the status will be set to ‘Picking Required’. If it is not configured for picking required, the status will be updated to ‘In Progress’.

Reject: will be available for web order types of customer orders that are in an open state. The user must have the Reject Customer Orders permission. All item quantities that have not yet been picked will be canceled/ rejected. A system generated reverse pick will be created for the rejected items. For more information, see section Customer Order Reverse Picks.

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Item Detail (Customer Orders)

Figure 12-50 Item Detail Screen



The Item Detail screen is accessed by selecting or scanning an item (user preferences is set to Scan Navigate) that is on the customer order on the Customer Order Items screen.

Scanning or entering an item on this screen will refresh the item detail screen for the item on the customer order. The user can page through the items on the customer order. This screen is view only.

The scan details at the top display the details of the last scanned barcode. The arrows at the top allow the user to page to the next and previous items.

Fields include:

- Item ID and description
- Item Image (per user preference)
- Order Line – if duplicate line items exist
- Location – the location for the item
  - Only displayed if “Display Sequence Fields” is set to ‘Yes’
  - If the item has stock in the backroom, then the first backroom location will be displayed if there is one, otherwise it will display “backroom”.

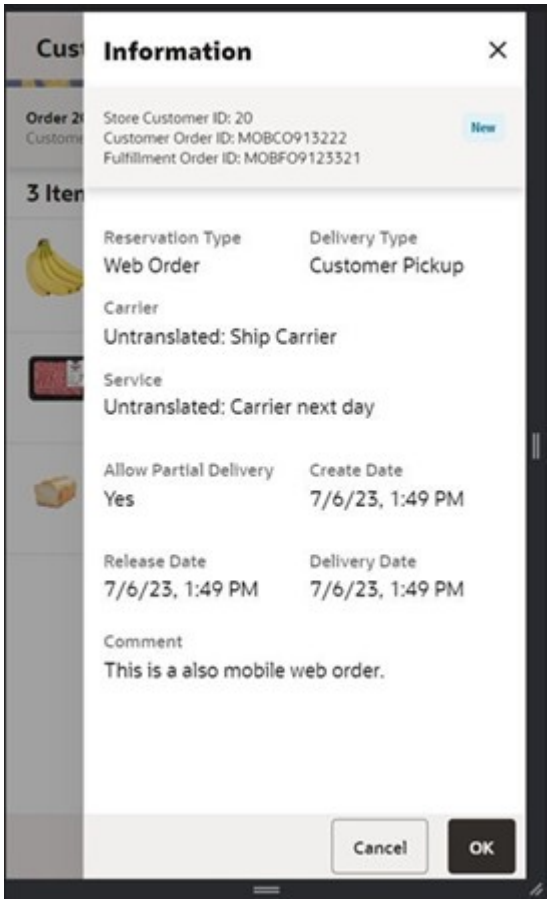
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  - If the item has stock in the shopfloor, then the first shopfloor location will be displayed if there is one, otherwise it will display “shopfloor”.
  - If items have no stock in the backroom or the shopfloor, the first backroom location will be displayed, otherwise the first shopfloor location, and if that doesn’t exit it will display “No Location”.
  - Tapping on the location will navigate to the Locations popup.
- Substitute For – will only be displayed if the item was added as a substitute for another item. This will show the original item that it was substituted for. Tapping on this field will navigate to the item details for that item.
- Ordered Quantity
- Pack Size
- Remaining
- Picked
- Delivered
- Canceled
- Last Update
- Comments
- <X> Substitutes - <*X*> is the number of substitutes for the item.
  - Selecting this expander icon will display the substitute items for this item.
  - Tapping on a substitute item will navigate to the details of that item.

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Information (Customer Orders)

Figure 12-51 Information (Customer Orders)



The Information screen contains information about the header level of the customer order. It is accessed through the Information menu option in the Footer menu on the Customer Order Items screen. Details include:

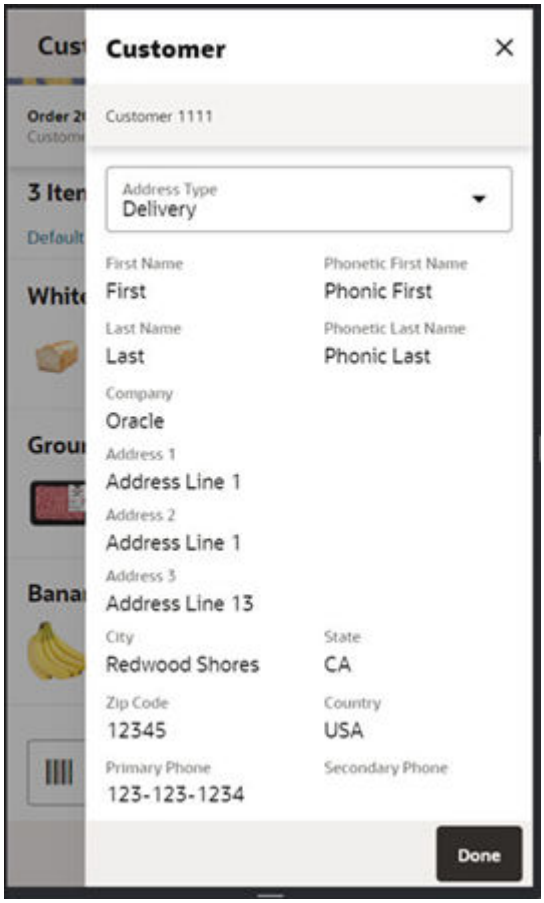
- Store Customer Order ID
- Customer Order ID
- Fulfillment Order ID
- Status
- CFAs (Flexible Attributes). The user can capture CFAs on this screen. Security permission is needed for entering CFA values.
- Reservation Type – web order, layaway, POS order, on hold
- Delivery Type – ship to customer, customer pickup, layaway, POS order, on hold.
- Carrier
- Service
- Allow Partial Delivery

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- Create/Release/Delivery Dates
- Comments

Customer

Figure 12-52 Customer Popup



The Customer screen has read-only information about the customer on the customer order. It is accessed through the Customer menu option in the overflow menu. The user must have Access Customer Details permission. Customer information is not held in SIOCS, and it is accessed via a web-service to an external system.

Customer Order Picking

The Picking process is a formal process of the system telling the user what items need to be picked and the user going out, physically picking the items, and setting them aside. Once the items are set aside, they will then be used during the fulfillment process for shipping to, or pick up by the customer.

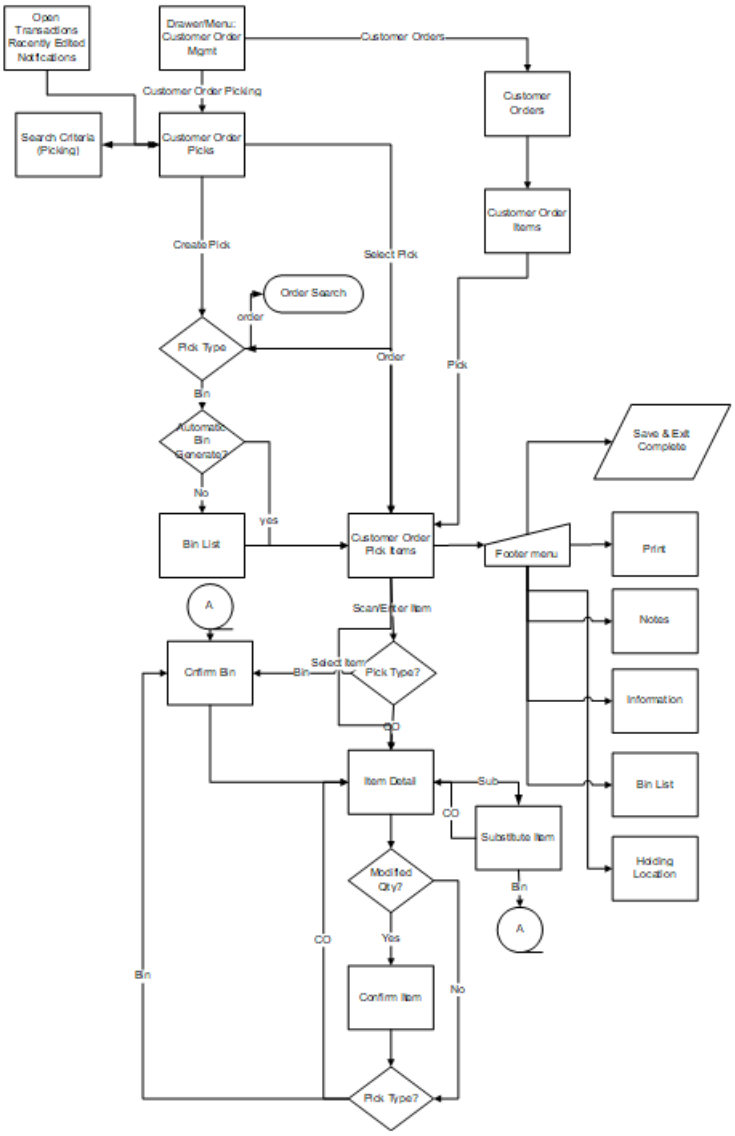
Features:

- Search for customer order pick
- View/edit an existing customer order pick

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- Delete a customer order pick
- Create a customer order pick

Figure 12-53 Customer Order Picking Screen Flow



The user will access the Customer Order Picking dialog from the Customer Order Management menu in the drawer. The Pick List screen will display the list of Active picks. The user can go to the Search Criteria screen to search for picks using alternate criteria.

From the Customer Order Picks screen, the user can select a pick to go to the Pick Items (detail of pick) for viewing or editing purposes.

Also from the Customer Order Picks screen, the user can Create a pick. The pick may be created by bin or customer order. When creating by customer order, the user will need to specify which order is being picked and, once that is done, the system will generate a pick and navigate to the details of that Pick on the Pick Items screen. When creating by bin if the system is configured to automatically generate the bins, the user will go to the details of the Pick (Pick

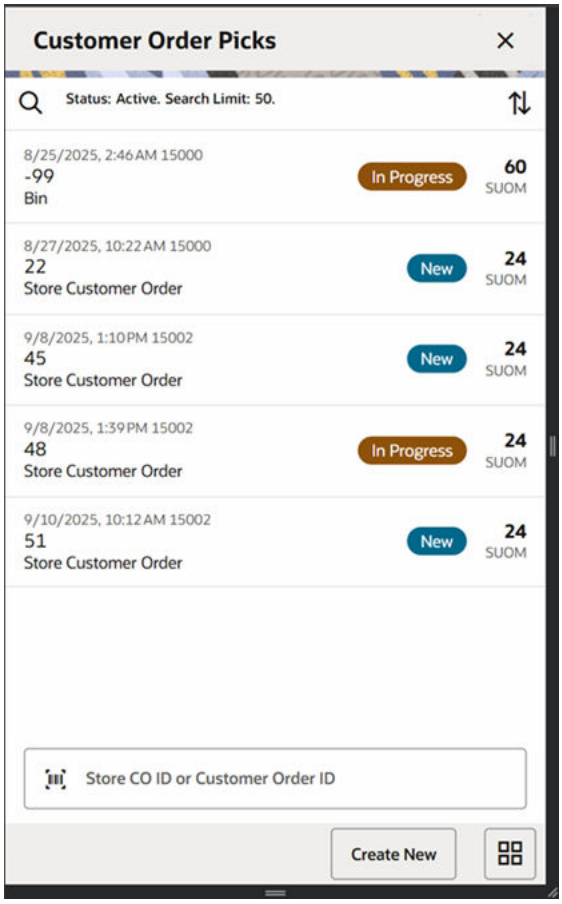
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Items). Otherwise, if manual bin capture, the user must first capture the bins before going to the Pick Details.

Once in a pick, the user can pick items, add substitutes, print, add notes, view info, modify bins, save, or complete the pick.

Customer Order Picks

Figure 12-54 Customer Order Picks Screen



The Customer Order Picks screen is accessed by selecting the Customer Order Picking menu option from within the Customer Order Management menu in the drawer/menu as well as in the Quick Actions menu. The user must have ‘Access Customer Order Picks’ permission. The screen will display the Active status customer orders picks by default which is all picks which are in ‘New’ or ‘In Progress’ status. The user can click the magnifying glass to go to the Search Criteria screen. Create will display the Create Pick popup. There is also a sort to sort the results.

Picks that have customer orders that are “Full flow” and “Quick flow” will appear in the list and can be searched. Selecting a pick that has “Full flow” will navigate to the Pick Items screen in the customer order full flow dialog. Selecting a pick that has customer orders that are “Quick flow” will navigate into the quick flow customer order dialog for that order.

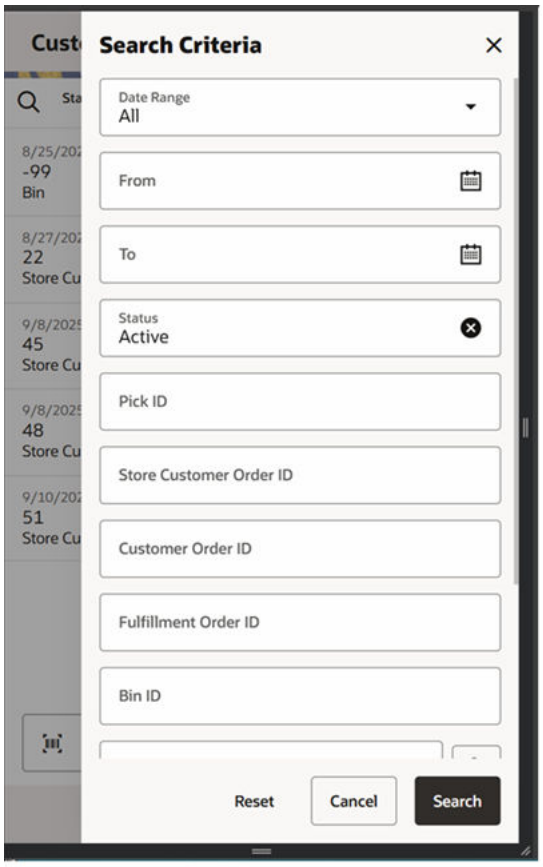
Fields on this screen include:

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- Date - Date that the pick was last updated.
- User - User that created the pick.
- Pick ID - System-generated Pick ID.
- Type - Either Bin or Store Customer Order.
- Status - Status of the customer order pick.
- Suggested Pick Quantity - Total quantity suggested to be picked across all line items.

Search Criteria (Pick List)

Figure 12-55 Search Criteria Screen (Pick List)



The Search Criteria for Customer Order Picking is accessed by the magnifying glass on the Customer Order Picks screen. After applying the search criteria, the results will be listed on the Customer Order Picks screen and the criteria applied will show.

Search criteria includes:

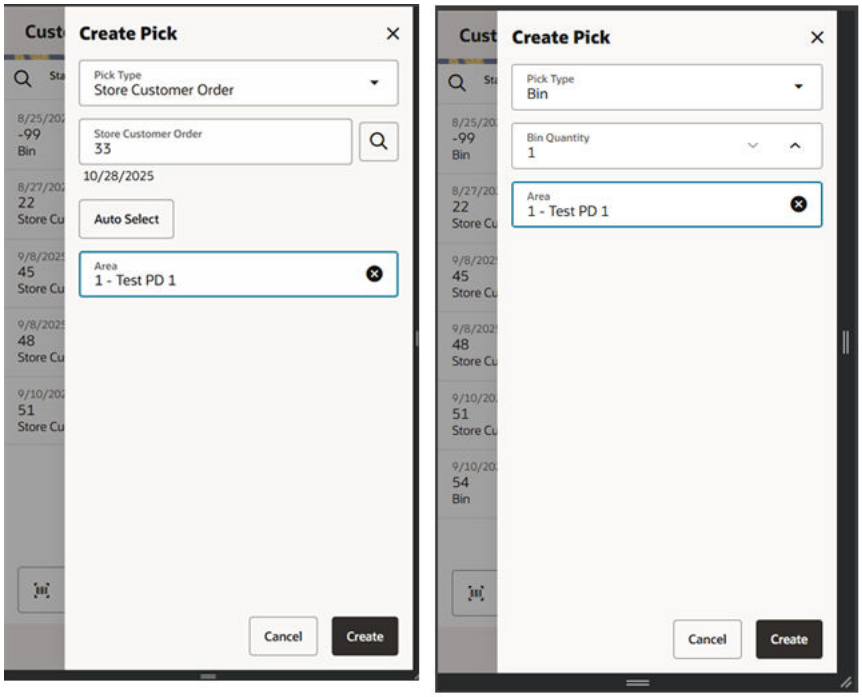
- Date Range
- From/To Date
- Status
- Pick ID

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- Store Customer Order ID
- Customer Order ID
- Fulfillment Order ID
- Bin ID
- Area – only displayed when the store is configured for Allow Picking by Area is set to ‘Yes‘ and the system config for Customer Order Fulfillment Restriction is set to ’Transation Controlled‘
- Item
- User
- Search Limit

Create Pick

Figure 12-56 Create Pick Popup within Picking



The Create Pick popup is accessed by selecting the **Create** button from the Customer Order Picks screen.

The create pick allows for the creation of a customer order pick by either Store Customer Order ID or by bin. The type will default per the store setting **Default Customer Order Picking Method**.

When selecting Store Customer Order, the user must enter in the Store customer order ID to be picked or use the search function to select one from the list. There is an **Auto Select** button that can be used in which the system will select the “best” customer order to pick based upon status, dates, etc. It is the same logic that is used as when picking by bin for a single bin. When creating a pick by Store Customer Order ID, there will only be one Customer Order Fulfillment Order per pick transaction.

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When creating a pick by bin, the user will define the number of bins to be put on the pick. Initially, the bin quantity will be defaulted based upon the store admin setting **Default Number of Bins**. The user has the potential to override this quantity if the store admin setting **Override Bin Quantity** is set to 'Yes'. Picks created by Bin allow for multiple customer orders to be put on the pick; one store customer order per bin. It will first look to all store customer orders that are the oldest based upon release date.

A user can also do a create pick from within the customer orders dialog by selecting Pick from the footer menu. In this case the user goes directly into the pick, unless Area is configured, then the user will be prompted to capture the Area first. All other rules for creating the pick will be the same as those above for picking by store customer order ID.

In both picking types, by Store Customer Order ID and by bin, a pick can be created by Area. Picking by Area allows a user to create a pick for a customer order that is for a specific Area of the store. This is only possible if the store configuration **Allow Picking by Area** is set to 'Yes' and the system admin of **Customer Order Fulfillment Restriction** is set to 'Transaction Controlled' (meaning that the entire customer order does not have to be picked in one pick). Areas are set up in the desktop application in the Area dialog. If Area is an option, the system will give a list of 'Completed' status Areas, with one of the options being **None** for no area.

Customer Orders that will be available for picking will follow these rules:

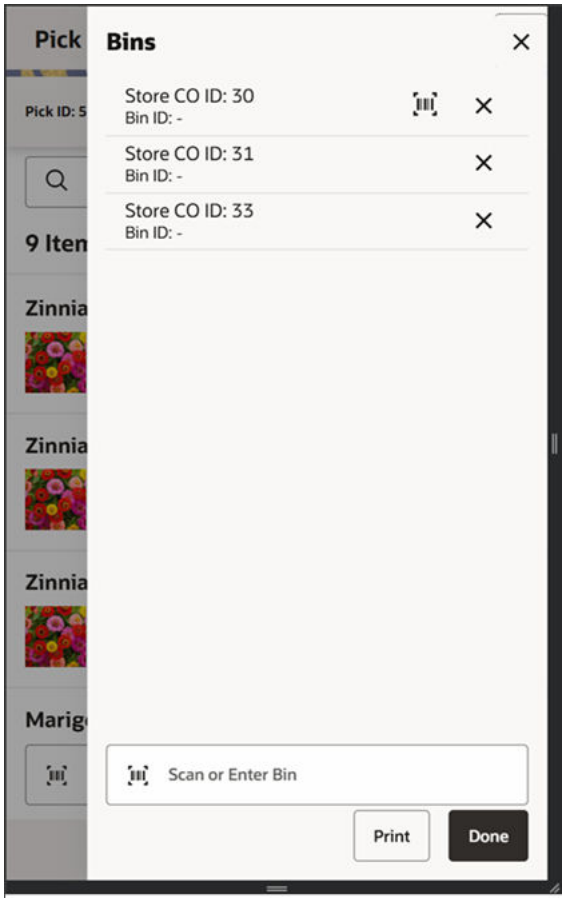
- Customer order must be a web order type.
- Customer order must still be open.
- There cannot be an existing open pick for the customer order.
  - If Area is being used, open picks are allowed for the customer order, as long as it is not for the same area.
- Customer order must have at least one item on the order with items remaining to be picked.
- If the system admin **Customer Order Fulfillment Restriction** equals ‘Transaction Controlled’, the system will also need to check that there is stock available to be picked for at least one item.
  - If the pick is by Area of **None**, all items from the customer order will be put on the pick.
  - If the pick is for a specific area, the system will put the items from the customer order which are in the selected area.
- If **Customer Order Fulfillment Restriction** equals ‘Restricted’, there must be enough available stock for all items on the pick to be fully picked in their entirety.
- If **Customer Order Fulfillment Restriction** equals 'Line Controlled, the user will not be able to create the pick if there is not enough available stock to pick at least one item fully.
- Items that allow for substitutes will have their stock ignored. This is because they can have items substituted for them.

Upon selecting **Create**, for picks created by customer order, the user will navigate to the Pick Items screen for the generated pick. For picks created by bin, if the system is configured for manually capturing bins, it would go to the bins screen first to capture the bins. For system generated bins, the system navigates to the Pick Items screen and the bins would be system generated.

If any of the items that are to be generated on the pick are on an open “Investigate” item basket, they will not get added to the pick.

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Figure 12-57 Bins Screen



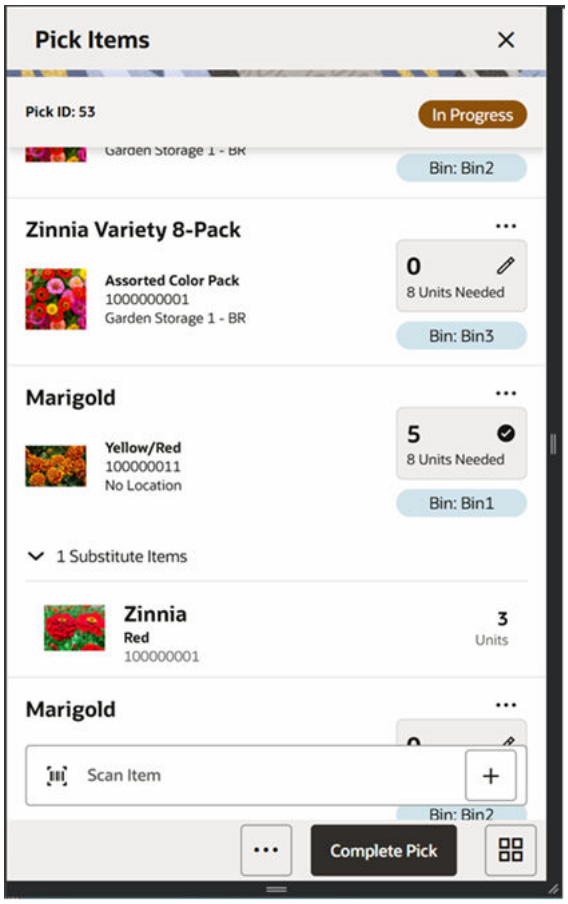
The Bins screen applies to those picks which are created by bin. Picks by bin will have bins manually or system generated per the store admin setting. For manually-captured bins, the user will be directed to the Bin List screen immediately upon creating the pick prior to going to the Pick Items screen.

Bins can be added by typing them in or scanning a barcode. Bins must be unique across all open picks. Bins are only editable for manually-captured bins. System and manually captured bins can be viewed from the Bin option within the footer menu of the Pick Items screen. The bins can be printed by selecting the Print button.

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Customer Order Pick Items

Figure 12-58 Pick Items Screen



The Pick Items screen is accessed by selecting an existing pick from the Customer Order Picks screen, or by creating a new pick. It can also be accessed from Open Transactions, Recently Edited and Notifications. Proper permissions are required.

The Filter allows the user to narrow down the list of items by: Item ID, Item description, bin, and UOM. Sorting is also available. When selecting location as a sort option: the items are listed in order with those items with stock on hand in the backroom being displayed first, followed by items with shopfloor stock on hand, and lastly those that do not have stock on hand in either the backroom or the shopfloor. All items are ordered by macro sequence location.

The Pick Items screen displays all of the items on the pick. If an item has substitutes there will be an expander icon that can be selected that will display the substitutes below the original item.

Header fields include:

- Pick ID
- Store CO ID (if the pick was created by customer order ID)

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- Status
- Number of Items
- Holding Location – displays the holding location of the picked items, if one is assigned, and can be selected to add/edit the holding location.

Item fields include:

- Item ID
- Item Description
- Item Image (per user preferences)
- Order Line – if duplicate line items exist
- Location – the location for the item
  - Only displayed if “Display Sequence Fields” is set to ‘Yes’
  - If the item has stock in the backroom, then the first backroom location will be displayed if there is one, otherwise it will display “backroom”.
  - If the item has stock in the shopfloor, then the first shopfloor location will be displayed if there is one, otherwise it will display “shopfloor”.
  - If items have no stock in the backroom or the shopfloor, the first backroom location will be displayed, otherwise the first shopfloor location, and if that doesn’t exit it will display “No Location”.
- Pack Size
- Bin – if the pick was created by bin
- Pick Quantity – the quantity picked by the user
- Needed Quantity – the quantity suggested to be picked by the system
- … (overflow menu) – Add and Remove from Item Basket. Allows user to add and remove the item to an open ‘Investigate’ item basket. If one does not exist, it will be created.
- Pick Icon (circle with checkbox) – displayed when the item has been fully picked

Selecting an item will navigate to the Item Detail screen for that item. Scanning is also allowed. For picks by customer order, if the user preference **Scan Navigate** is set to ‘Yes’ the user is directed to the Item Detail screen. If it is set to ‘No’, the user is taken to the scanned item in the list. For picks created by bin, the user is directed to the Confirm Bin popup to validate the bin prior to going to Item Detail. The quantity may be updated per the quantity scanned.

Complete: The user can select Complete from the footer to complete the pick. The user must have proper permissions.

- The pick will be moved to ‘Completed’ status, and the user returns to the Customer Order Picks screen.
- Holding location may be required per store configuration Holding Location Required.
- When completing, if any of the store customer order quantities on the pick transaction have been canceled or delivered since the pick was created, and the total pick quantity for the item is now greater than the remaining pick quantity:
  - The Adjusted Pick Qty field (on Item Detail) will be updated to indicate to the user how much is needed to pick based upon the changes (delivery and cancels) that were made on the customer order.
- Upon complete, the system will check the system admin, ‘Customer Order Fulfillment Restriction’:

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  - If it is set to ‘Restricted’, the entire customer order must be picked in its entirety.
  - If it is set to ‘Line controlled’, any item that is getting picked must be picked in its entirety.
  - If it is set to ‘Transaction Controlled’, no restrictions.
- Tolerances
  - When the item has a variable unit of measure (not Units), it can be difficult to pick the exact amount suggested. For example: picking 2 pounds of bananas might end up truly being 2.2 lbs. The quantity picked may exceed the suggested if the defined tolerances are setup to allow for such.
- Substitute Items
  - Substitute Items are considered in the Total Pick Qty when doing all quantity validations.
  - The reserved quantity for the original item is decreased by the rolled up pick quantities.
  - The substituted items that have an actual pick quantity greater than zero will have their reserved quantity increased for the amount being substituted.
- Upon successful completion
  - The pick will be moved to ‘Completed’ status, and the user returns to the Customer Order Picks screen.
  - The Customer Order record is updated with the picked quantities.
  - If more was picked than what was ordered/reserved, the reserved quantity will be updated (in the case of over picking due to tolerances for non unit items).
  - Substitute items are added to the customer order.
  - The pick is published out.

Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Pick Items screen. The menu functions will include the following:

Notes: will access the notes common dialog to capture notes. Notes can only be added for picks by Store Customer Order ID. The note will be saved on the customer order and not the pick.

Print: will display the common print dialog to print the customer order pick report.

Info: will access the Information popup.

Back: is only applicable to view only picks and will exit to the Customer Order Picks screen.

Cancel: will exit to the Customer Order Picks screen and no changes will be saved.

Delete: will allow deleting a 'New’ or ‘In Progress’ status pick and moves it to ‘Canceled’ status. The user will return to the Customer Order Picks screen.

Refresh: will refresh the customer order pick and pull in any delivered or canceled quantities that have happened for the delivery.

Holding Location: will navigate to the Holding Location screen.

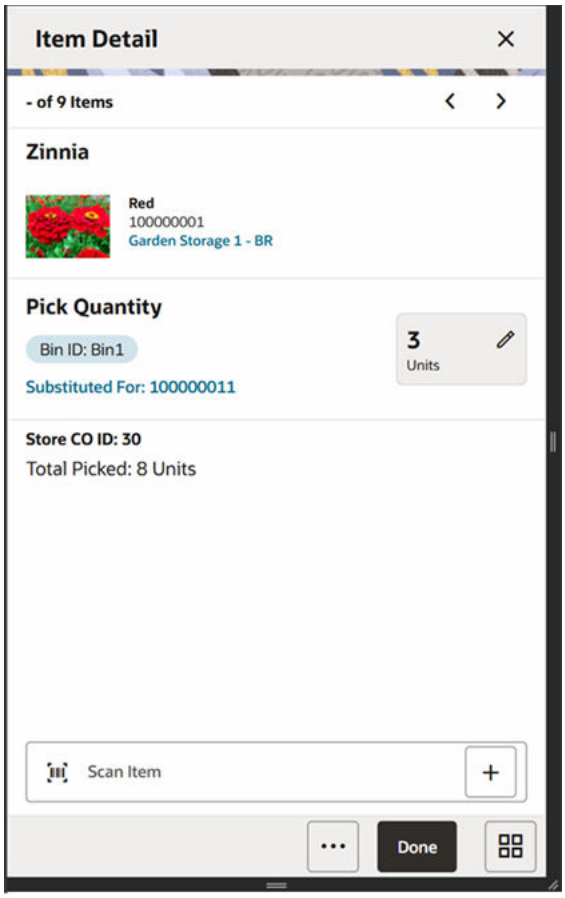
Bins: will access the Bins screen.

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Save & Exit: will save the pick as ‘In Progress’ status and return the user to the Customer Order Picks screen.

Item Detail (Picking)

Figure 12-59 Item Detail Screen



The Item Detail screen contains the details for the specific item on the customer order pick. Entering/scanning an item on this screen will refresh the screen and update item and the pick quantity for the item. If the pick is by bin, first the user will have to Confirm the bin before refreshing the details for the item.

The scan details at the top displays the details of the last scanned barcode. The arrows at the top allow the user to page to the next and previous items.

Fields Include:

- Item ID and description
- Item Image (per user preference)
- Order Line – if duplicate line items exist
- Location – the location for the item
  - Only displayed if “Display Sequence Fields” is set to ‘Yes’
  - If the item has stock in the backroom, then the first backroom location will be displayed if there is one, otherwise it will display “backroom”.

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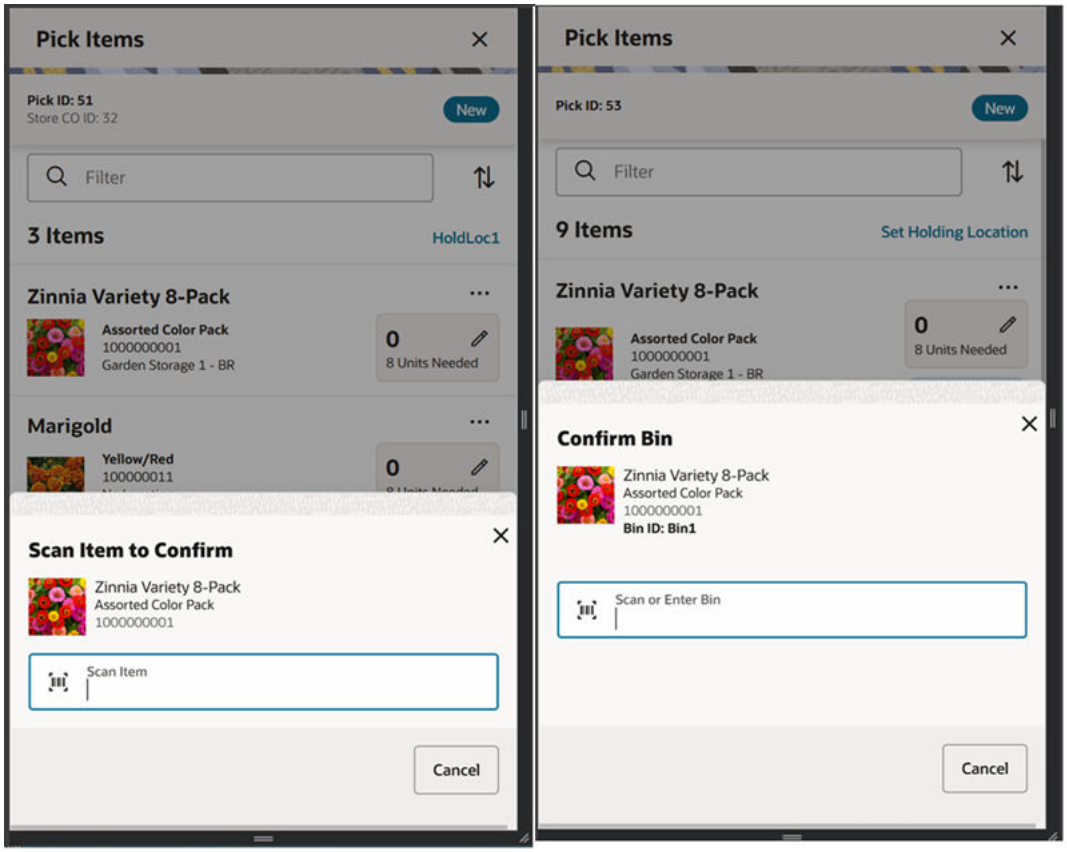
  - If the item has stock in the shopfloor, then the first shopfloor location will be displayed if there is one, otherwise it will display “shopfloor”.
  - If items have no stock in the backroom or the shopfloor, the first backroom location will be displayed, otherwise the first shopfloor location, and if that doesn’t exit it will display “No Location”.
  - Tapping on the location will navigate to the Locations popup.
- Bin – bin associated with the pick/customer order. Only displayed if the pick was created by bin.
- Substituted – will display as ‘Yes‘ if this item has items that were substituted for it. If this item does not have substitutes, then it will display as ‘No‘.
  - The field only displays if the item is flagged on the customer order to allow for substitute items.
  - Tapping on this field will navigate to the Substitute Items screen. Security permissions must exist.
- Substitute For – will only be displayed if this item was added as a substitute for another item.
  - This will show the original item that it was substituted for.
  - Tapping on this field will navigate to the item details for that item.
- Pick Quantity – is editable by the user and represents how many of this item is being picked.
  - Editing the quantity is controlled by security.
  - If the quantity is edited, the user will be prompted with the Confirm Items popup to confirm the proper item and also the confirm bin (if pick is by bin).
- Needed Quantity – displays the quantity the system suggests to be picked.
- Pack Size
- Store CO ID – displays the customer order ID associated to the item on the pick.
  - This is displayed for picks created by order or by bin.
- Adjust Quantity – is the suggested pick quantity that is updated by the system upon refresh or trying to complete the pick.
  - It reflects any deliveries or cancellations that have occurred on the customer order since the time the pick was generated.
- Total Picked – is the total amount picked for the item along with all of its substitute items.
- <X> Substitutes – <*X*> is the number of substitutes for the item.
  - Selecting this expander icon will display the substitute items for this item.
  - Tapping on a substitute item will navigate to the details of that item.

The footer menu provides Add and Remove from the Item Basket options. This allows the user to add and remove the item from an open ‘Investigate’ item basket. If one does not exist, it will be created.

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Confirm Item/Confirm Bin

Figure 12-60 Confirm Item/Confirm Bin Popup



After editing the pick quantity the user will be required to confirm the item in the **Confirm Item** popup. This is to validate the proper item is being picked. This is not required when scanning an item.

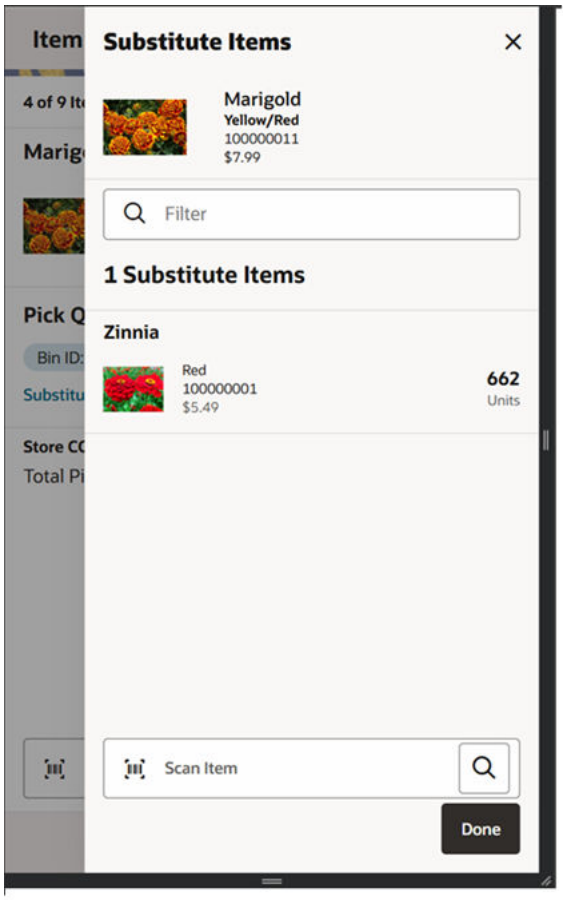
For picks that are by bin, the user also needs to validate that the items are being placed into the proper bin. When scanning/entering an item or editing the pick quantity, the user will be directed to the **Confirm Bin** popup to scan the bin for the item. This is only the case when in scan increase or decrease mode and not applicable to when in review mode.

> **Note**
>
> The confirm bin will occur after the Confirm Item (if applicable).

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Substitute Items

Figure 12-61 Substitute Items Screen



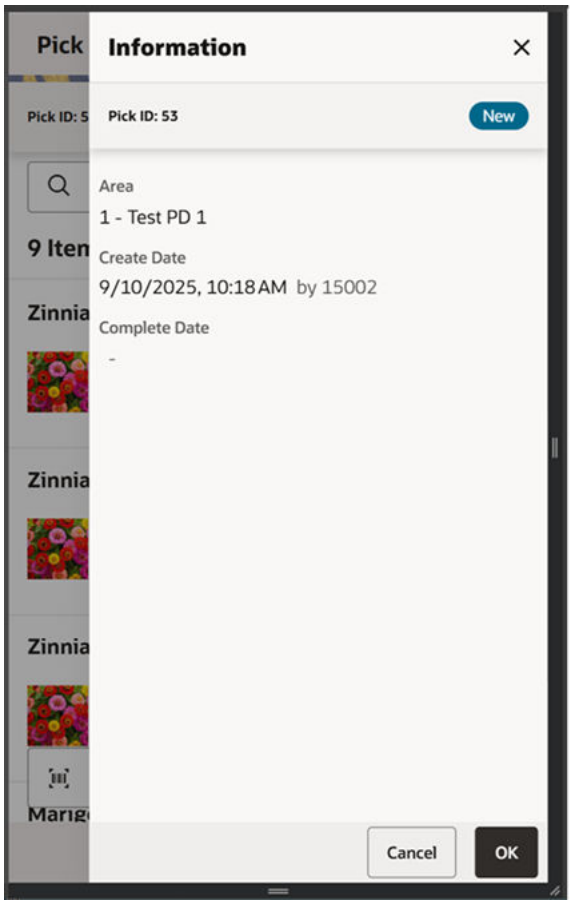
The Substitute Items screen is accessed by selecting the Substituted field on the Item Detail (Picking) screen. This screen is only available for items that are flagged to allow for substitute items, and the pick must be in an editable state.

This screen will list all of the related items that are substituted items with available stock for the item being picked (if there are any). If the **Item Substitution - Store Discretion** equals 'Yes', the user does not have to use one of the items in the list, and can also enter/scan any item for substitution. It will be added to the pick as well as to the **Substitute Items** list. If the user does not have store discretion, only items from the list can be selected.

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Information (Picking)

Figure 12-62 Information (Customer Order Pick) Screen



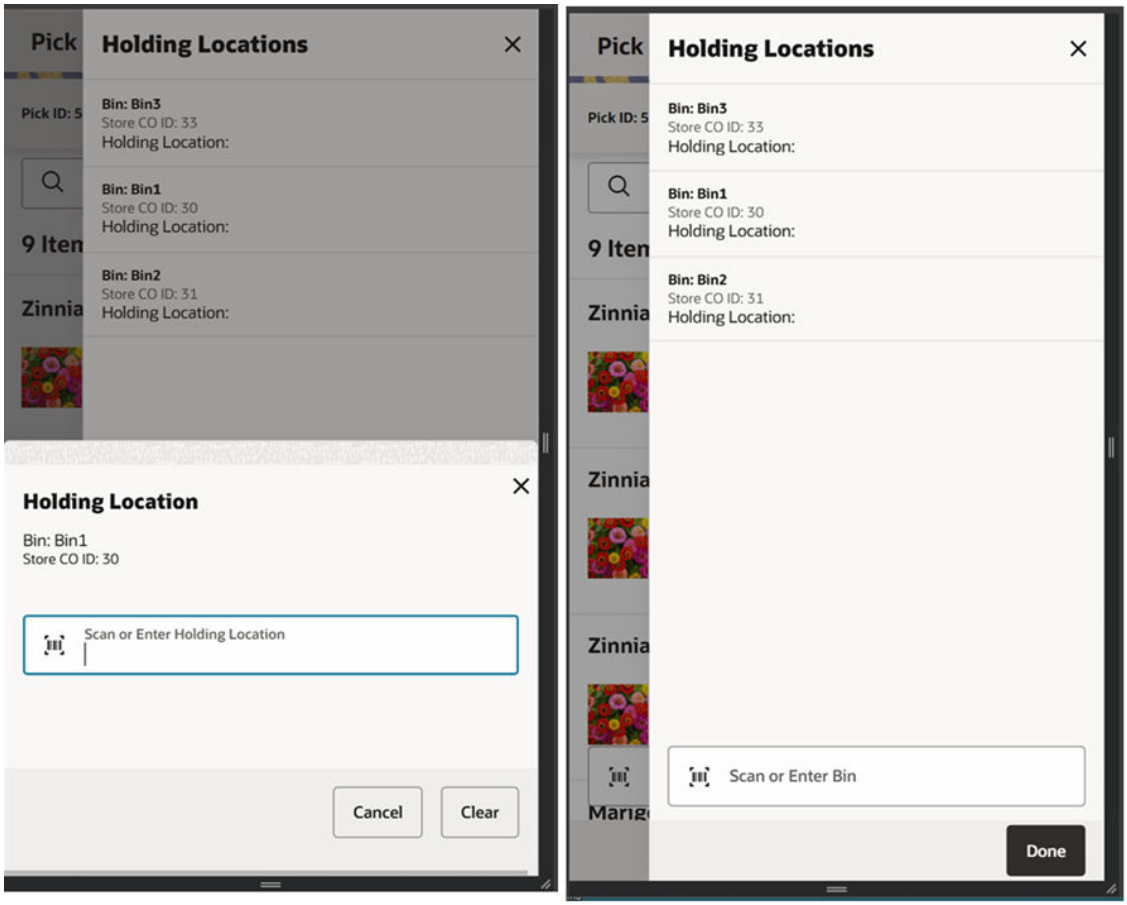
The information screen is an informational popup that contains information about the header level of the customer order pick. It is accessed through the Info menu option in the Footer menu on the Pick Items screen. Details include:

- Pick ID
- Status
- CFAs (Flexible Attributes) will be displayed. The user can capture CFAs on this screen. Security permission is needed for entering CFA values.
- Area – the area that needs to be picked. Only displayed if **Customer Order Fulfillment Restriction** is set to 'Transaction Controlled' and an area is assigned to the pick.
- Create Date and Create User
- Complete Date and Complete User

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Holding Location

Figure 12-63 Holding Location



The Holding Location is used to define where the items for the customer order will be “held” once being picked by the associate until they are picked up or shipped. Customer Orders will have one holding location field associated with them.

Customer Order picks that are for multiple customer orders (picked by bin), will have potentially more than one holding location. There will be one holding location associated to each bin/ customer order. The user can scan or enter the bin and then capture the holding location. The system will validate the store configuration Holding Location Required. If it set to ‘Yes’, and the user has not entered a holding location, then upon completing the pick, the system will navigate to the holding location screen to capture the holding location. If it set to ‘No’ the holding location is not required.

Customer Order Deliveries

Delivering of a customer order consists of collecting the items that have been picked and then getting them to the customer (shipment or pickup). This might be for a customer pickup in the store / curbside or shipping them to the customer.

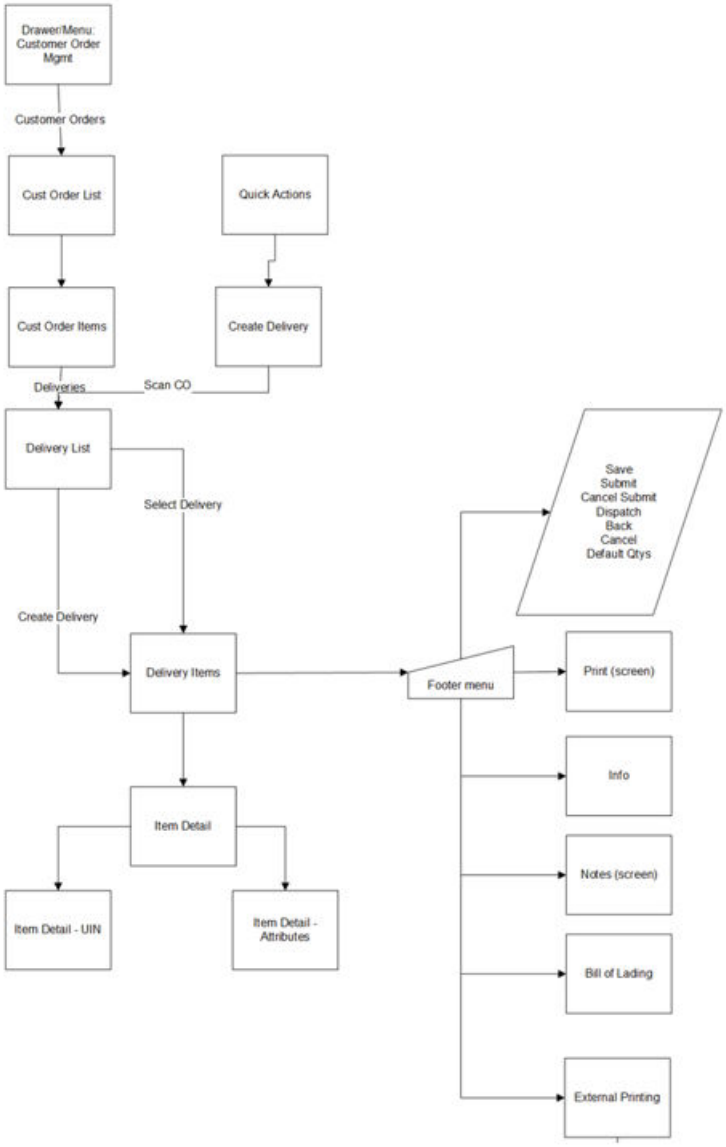
Features:

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- View customer order delivery (web order and non-web orders)
- Edit an existing customer order delivery (web order)
- Delete a customer order delivery (web order)
- Print a customer order delivery
- Create a customer order delivery (web order)

> **Note**
>
> Throughout the Deliveries dialog the screens will display dynamically as Pickup / Curbside / Shipment dependent on the delivery type. They are referred to as “Delivery“ generically for ease.

Figure 12-64 Customer Order Delivery Screen Flow

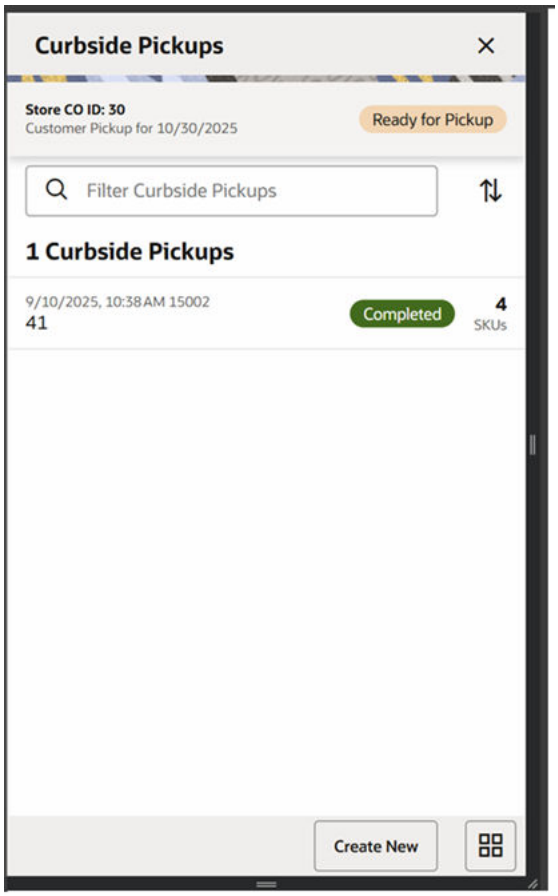


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Customer order deliveries will be accessed from the **Customer Order** dialog on the **Customer Order Items** footer menu via the Pickups / Curbside Pickups / Shipments menu option. The user must have proper permission. Customer order deliveries can be created and edited for web order types. Non web orders can only be viewed and are fulfilled through the POS system. Customer order deliveries will allow for viewing, creating, editing, saving, submitting, dispatching, printing, BOL, and deleting of customer order deliveries. A shortcut to create a customer order delivery can be created via the Quick Actions menu (with proper permission).

Pickups / Curbside Pickups / Shipments (List screen)

Figure 12-65 Deliveries (List) Screen



The Deliveries screen will be called Pickups, Curbside Pickups, or Shipments depending on the delivery type of the customer order. It will be accessed by selecting the corresponding **Delivery** menu option within the footer menu of a specific customer order. The user must have proper permissions. The screen will display all of the customer orders deliveries for the specific customer order. The deliveries displayed may be for web orders that were created within the system, a third-party system such as POS, or they may be for POS on holds and layaways.

Since there will never be a large number of deliveries for a specific customer order, there is no search criteria screen. There is however a filter bar, which allows for filtering by: delivery ID, status, date, user, tracking ID, and Fiscal Doc ID. Records can also be sorted.

Selecting a delivery will navigate to the details for the customer order delivery.

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The **Create** button will attempt to create the delivery and navigate to the corresponding Delivery Items screen. **Create Delivery** is also available from within the Quick Actions menu. The user must have proper permissions to create a delivery.

New Deliveries can only be created for web order customer orders that are not in 'Completed' or 'Cancelled' status, which means there is remaining quantity yet to be fulfilled.

If open Reverse Picks exist for the Customer Order, that option will be available rather than the Deliveries option. The Reverse Pick will need to be processed prior to creating the delivery.

In case the system is configured to require picking, it will validate there are item quantities on the customer order that have been picked which have not yet been delivered prior to creating the delivery. Next, the system will check the **Allow Partial Delivery** indicator which is on the customer order fulfillment order. If this is set to 'No', it means that the entire order must be delivered together. The system would not allow the creation of the delivery unless the entire order has been picked. If picking is not required, the delivery will be created. The **Allow Partial Delivery** indicator will then be validated again upon dispatch of the delivery.

Once the system creates the delivery, the delivery will consist of all of the items that were auto populated from the customer order fulfillment order including substitutes.

This screen gives a quick view of the list of deliveries for the customer order along with the details such as delivery ID, status, status of the Fiscal Doc/E-way bill request(if the system is configured to use Fiscal Doc ID/E-way Bill ID), etc.

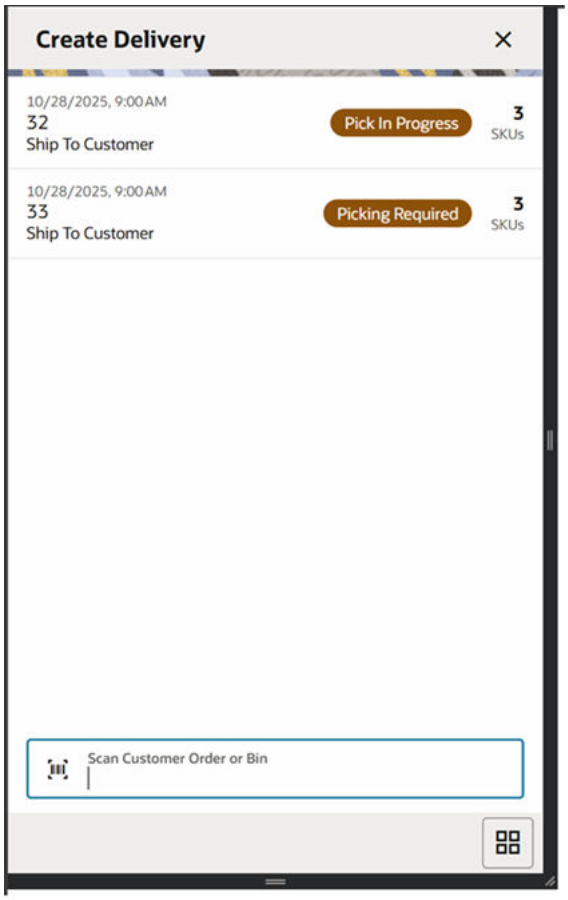
Important fields on this screen include:

- Store CO ID
- Delivery Type for Release Date – the type of delivery being ‘Ship to Customer’, Customer Pickup’, ‘Layaway’, ‘POS Order’, or ‘On Hold’
- Release Date – the date and time the customer order needs to leave the store
- Status – of the customer order
- Number of deliveries
- Each Delivery Record will include:
  - Last Update Date
  - User
  - ID
  - Status – of the delivery. ‘New’, ‘In Progress’, 'Submitted', ‘Canceled’, and ‘Completed’
  - E-way bill status
  - Number of SKUs

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Create Delivery

Figure 12-66 Create Delivery Screen



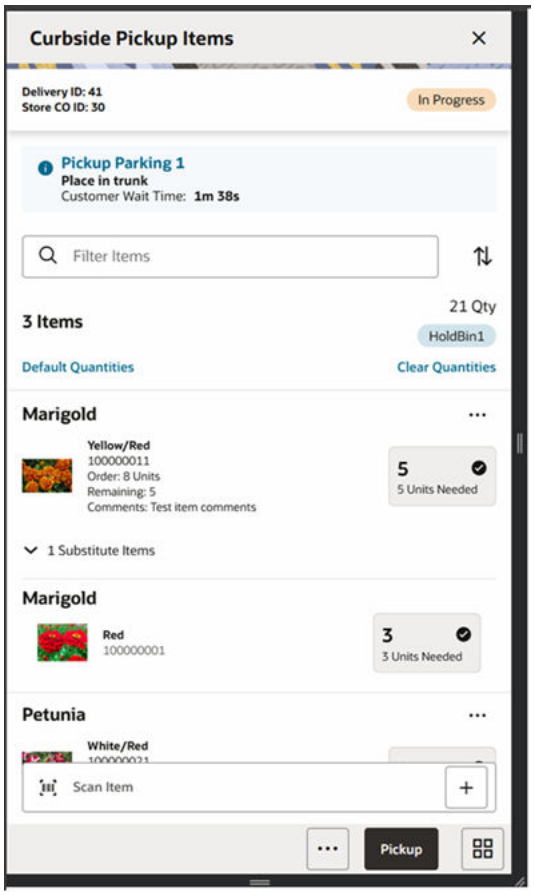
The Create Delivery screen is displayed when selecting Create Delivery from the Quick Actions menu. The user must have Create Customer Order Delivery permission.

The user can enter or scan the Customer Order ID or Bin and the system will look for customer orders in the system. If there is only one, the system will navigate to the Delivery Items screen to create a new delivery. If there is more than one, then the user will select the proper customer order from the list. The user must have the proper Create Customer Order Delivery for Shipment or Pickup permission that matches the delivery type of the customer order.

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Delivery Items

Figure 12-67 Delivery Items Screen



The Delivery Items screen is accessed by selecting an existing Delivery from the Deliveries (list) screen, or by creating a new delivery. It is also accessible by selecting an existing delivery from Recently Edited or from Notifications. The user must have proper permissions. Deliveries are not directly accessible from Open Transactions.

The Delivery Items screen displays all of the items on the delivery including the order and remaining quantities.

Selecting an item will navigate to the Item Detail (Customer Order Deliveries) screen for that item. Scanning an item will also navigate to the Item Detail screen for that item and the quantity may be updated per the quantity scanned or it will stay on the current screen and increment the quantity depending on the user preference **Scan Navigate**. If the item scanned is a UIN item, the user will navigate to the UIN tab within the Item Detail screen.

A Filter bar will allow to filter by Item ID and Item Description. Sorting of the items is also available.

Header Fields include:

- Delivery ID

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- Customer Order ID
- Fulfillment Order ID
- Status – of delivery
- Curbside Pickup Information – populated for delivery types of curbside pickup when this information has been populated by an external system
- Number of Items
- Quantity – total quantity of items on the delivery
- Default Quantities – defaults the quantity to what can be delivered, what is remaining
  - It will only update those items that do not have a quantity entered.
  - This button does not apply to UIN items.
- Clear Quantities – will clear out all entered quantities on the delivery.
- Holding Location

Item Fields include:

- Item
- Item Description
- Item Image – per user preference
- Order Line – if the order contains duplicate line numbers
- Comments – line level comments from the customer order
- UIN icon – will be displayed if the store allows for UINS and the item is a UIN item
- Extended Attributes icon – will be displayed if the item has extended attributes associated to it
- Order quantity
- Remaining quantity
- Pack Size
- Delivery Quantity – the delivery quantity to be entered by the user (editable)
  - Disabled for UIN items. UIN items must have UINS captured by selecting the quantity field.
- Needed Quantity – the remaining quantity to be delivered
- Ship Alone – will state if the item is a ship alone item
- Substitute Items – will have an expander icon to display the substitute items for the item, if they exist on the customer order
- …(Overflow menu) – will have an option to add extended attributes for the item

> **Note**
>
> If any item in the customer order has the **Customer Order Ship Alone** indicator set to 'Yes', then the system will not allow the user to deliver this item along with other items. Those items will need to be shipped alone.

Pickup / Dispatch:

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- The user must have proper permission.
- Will check if the **Allow Partial Indicator** is set to 'No, and if so, it will validate that the entire order is being delivered together. If not, the system will restrict the user from dispatching.
  - Those users with certain privileges will receive a warning and will be able to override this.
  - If the user does not have this privilege, and if there are items that need to be “shipped alone” the delivery cannot be dispatched.
- If the **Allow Partial Indicator** is set to 'Yes', the customer order can be delivered partially.
- If the system parameter **Customer Order Fulfillment Restriction** is set to 'Line Controlled' and **Allow Partial Indicator** is set to 'Yes':
  - If an item is getting delivered then it has to be delivered fully. Partial delivery of an item is not allowed.
- If the store parameter **Manifest Customer Order Deliveries** is set to 'No' and the system parameter **Tracking ID Required** is set to 'Yes':
  - The system should check if the Tracking ID has been captured or not. If not, an error message will be displayed.
- The Holding location may be required per store configuration **Holding Location Required**.
- Upon dispatch of the delivery the delivery will move to 'Completed' status, and the user returns to the Deliveries (list) screen.
- The delivery is published out.
- The stock on hand and customer order reserved quantities will be decremented by the delivered quantities.
- UINs will have the status updated to ‘Customer Order Fulfilled’.
- The customer order fulfillment order will have the delivered and remaining quantity updated.
- If the entire customer order has been fulfilled, meaning there is no remaining quantity, the customer order will be set to 'Completed' status.
- The Transaction History record is written.
- If the system is enabled to obtain **Fiscal Doc ID/E-way bill ID** as part of the shipping process, the delivery cannot be dispatched until the Fiscal Doc ID/E-way bill ID is available. The exception is when the user has ‘Allow dispatch without Fiscal Document ID’ security permission.
- The request of the E-way bill starts once the shipment is submitted.

> **Note**
>
> As part of the delivery process, if the manifest system is called, the system will also make a call to get the address information related to the customer order since this data is not stored in SIOCS.

Submit:

- Submit will submit the delivery and set it to 'Submitted' status and not allow for edits, and there are no updates to inventory at this point.

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- Submit is only available when the store configuration for **Dispatch Validate** is set to 'Ship Submit'. It is not possible when set to 'Ship Direct'.
- The only step possible will be to Cancel, Submit or Dispatch.
- Submit will check if the **Allow Partial** Indicator is set to 'No', and it will validate that the entire order is being delivered together. If not, the system will restrict the user from submitting.
  - Those users with certain privileges will be given a warning and will be able to override this.
- If the **Allow Partial** Indicator is set to 'Yes', the customer order can be delivered partially.
- If the system parameter **Customer Order Fulfillment Restriction** is set to 'Line Controlled' and the **Allow Partial** Indicator is set to 'Yes':
  - If an item is getting delivered then it has to be delivered fully. Partial delivery of an item is not allowed.
- If the store parameter **Manifest Customer Order Deliveries** is set to 'No' and the system parameter **Tracking ID Required** is set to 'Yes', the system should check if the Tracking ID has been captured or not If not, an error message will be displayed.
- If the system is enabled to obtain **Fiscal Doc ID/E-way bill ID** for the shipment, the process to request the E-way bill starts once the shipment is submitted.

Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Delivery Items screen. The menu functions will include the following:

Info: will access the Information popup

Holding Location: will take the user to the Holding Location screen

Bill of Lading: will access the BOL Info popup

Notes: will access the notes common dialog to capture notes. The note will be saved on the customer order.

Cancel: will exit to the Deliveries (list) screen and no changes will be saved.

Back: is applicable to view only deliveries and will exit to the Deliveries (list) screen

Save & Exit: will save the delivery in 'In Progress' status and return to the Deliveries (list) screen

Refresh: will refresh the delivery by getting the most current customer order/ fulfillment order information. There may be other picks or deliveries that have occurred in the time the delivery was originally created.

Cancel Submit: will set a 'Submitted' status delivery back to 'In Progress'

Delete: will delete an 'In Progress' status delivery and move it to 'Canceled' status. The user will return to the Delivery List screen.

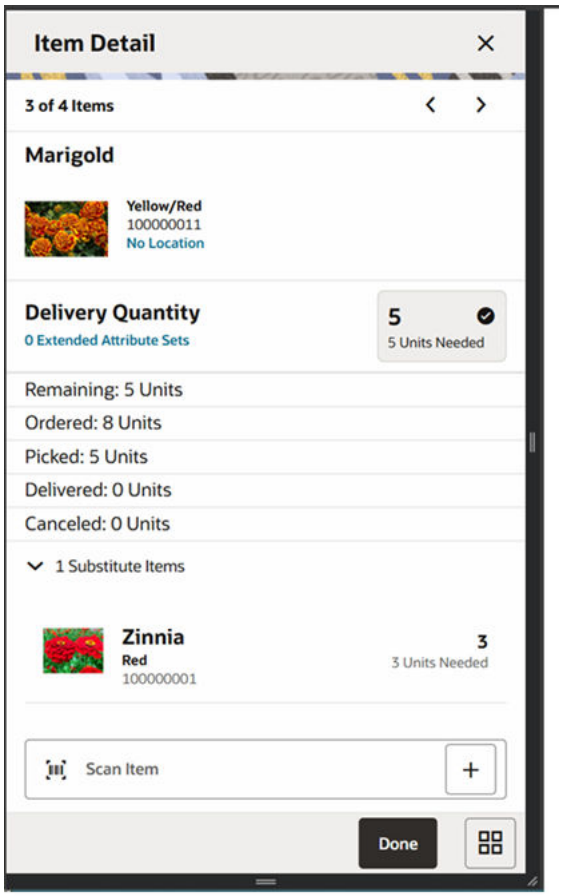
External Printing: will display the external printing dialog to select a printer for pre-shipment or manifesting

Print: will display the print dialog to print the report

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Item Detail (Customer Order Deliveries)

Figure 12-68 Item Detail (Customer Order Deliveries) Screen



The Item Detail screen contains the details for the specific item on the customer order delivery. Entering/scanning an item on this screen will refresh the screen and update the item and the delivery quantity for the item. If the item scanned is a UIN item, the user will automatically navigate to the UIN screen for the item.

The scan details at the top displays the details of the last scanned barcode. The arrows at the top allow the user to page to the next and previous items.

If the item has the **Customer Order Ship Alone** indicator set to 'Yes', then the system will not allow the user to deliver this item along with other items. Those items will need to be shipped alone.

Fields include:

- Item ID and description
- Item Image (per user preference)
- Order Line – if the order contains duplicate line numbers
- Location – the location for the item

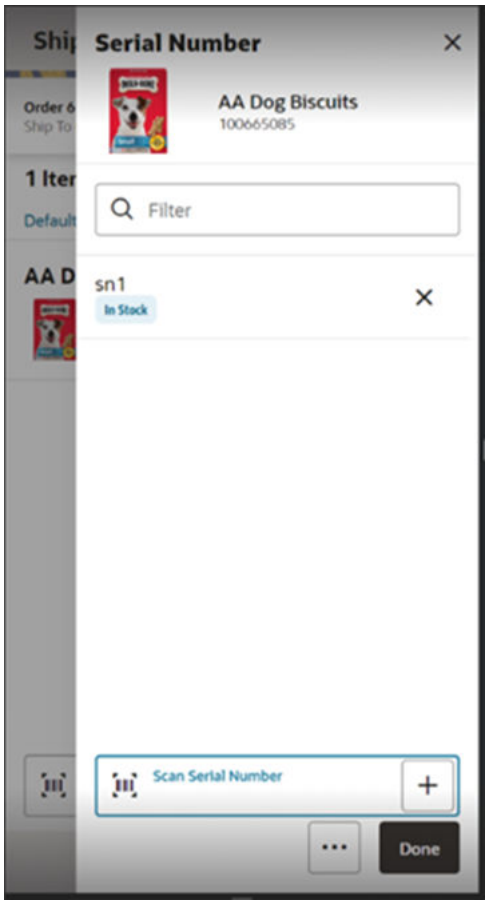
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  - Only displayed if “Display Sequence Fields” is set to ‘Yes’
  - If the item has stock in the backroom, then the first backroom location will be displayed if there is one, otherwise it will display “backroom”.
  - If the item has stock in the shopfloor, then the first shopfloor location will be displayed if there is one, otherwise it will display “shopfloor”.
  - If items have no stock in the backroom or the shopfloor, the first backroom location will be displayed, otherwise the first shopfloor location, and if that doesn’t exit it will display “No Location”.
- Delivery Quantity – how many to be delivered (picked up or shipped) by the user (editable)
  - Editing the quantity is controlled by security.
  - If picking is required, the quantity will not be allowed to exceed the pick quantity. If picking is not required, the quantity cannot exceed the remaining quantity.
  - Disabled for UIN items. UIN items must have UINS captured by selecting the quantity field.
- Substitute For – will display the original item that this item was substituted for
  - Tapping on this field will navigate to the Substitute Items screen. Security permissions must exist.
- Needed Quantity
- Remaining Quantity
- Ordered Quantity
- Picked Quantity
- Delivered Quantity
- Canceled Quantity
- Pack Size
- <X> Substitutes – <*X*> is the number of substitutes for the item.
  - Selecting this expander icon will display the substitute items for this item.
  - Tapping on a substitute item will navigate to the details of that item.

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UIN

Figure 12-69 UIN Screen



If the store is configured for UINs, and the item is a UIN item, then UINs must be captured for the items being put on the delivery.

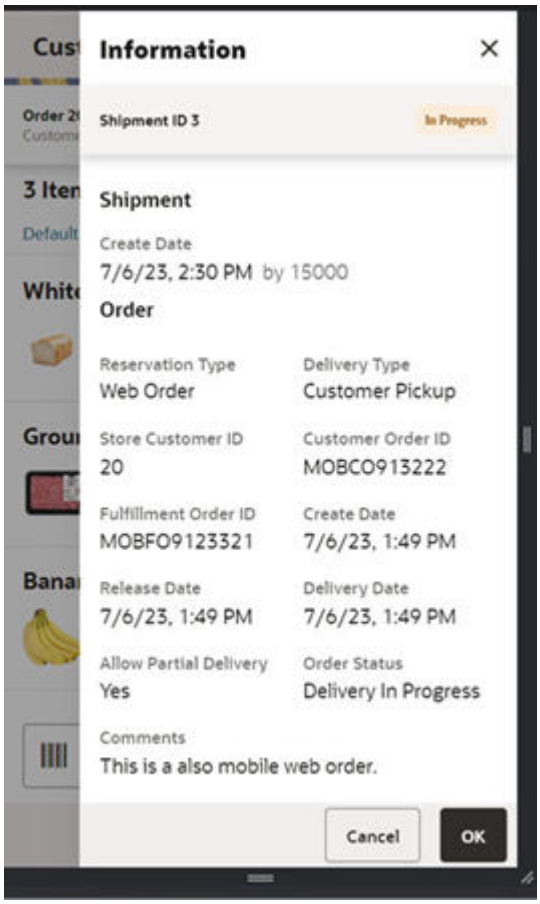
The UIN screen allows a user to add/remove UINs for UIN items (if the store is configured to use UINs and if the item is a UIN item). If the user scans a UIN item, the user will directly navigate to the UIN screen for that item.

Only UINs that are ‘In Stock’ can be put on a customer order delivery.

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Information (Shipment/Pickup/Curbside)

Figure 12-70 Information Popup



The Information screen contains information about the header level of the customer order shipment/pickup. It is accessed through the Information menu option in the footer menu on the Delivery Items screens. Details include:

- Delivery ID
- Status (delivery)
- CFAs (Flexible Attributes) will be displayed. The user can capture CFAs on this screen. Security permission is needed for entering CFA values.
- Create Date and User
- E-way Bill Fields:
  - Vehicle Number
  - Vehicle Country
  - Driver Name
  - Driver License Number
- Holding Location – link to display the holding locations

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- Reservation Type
- Delivery Type
- Store Customer Order ID
- Customer Order ID
- Fulfillment Order ID
- Order Create Date
- Order Release Date
- Order Delivery Date
- Delivery Create Date and User
- Delivery Update Date and User
- Submit Date and User
- Dispatch Date and User
- Allow Partial Delivery
- Status (order)
- Comments

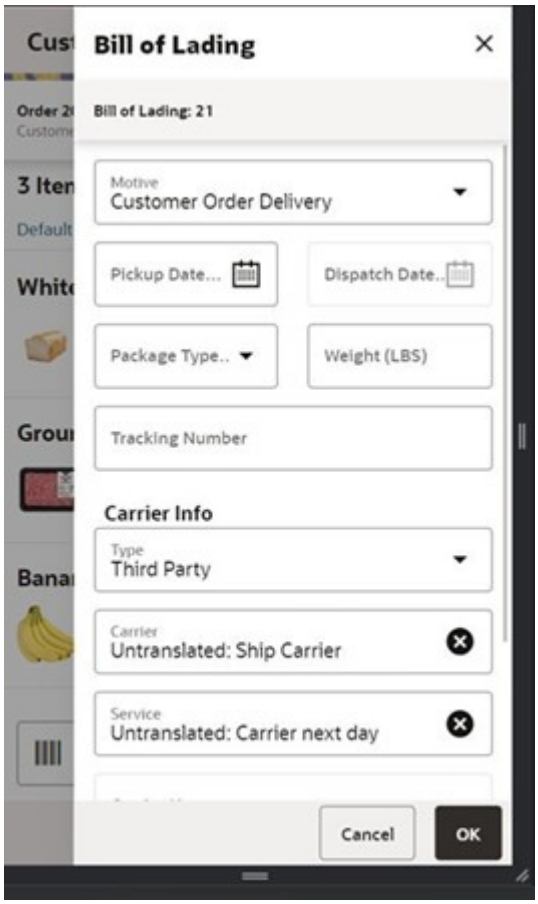
If the customer order is available for Direct Ship to Customer and Fiscal Documentation information is required and integrated, the screen will also display:

- Fiscal Request ID
- Fiscal Request Status
- Reject Reason
- Fiscal Doc ID
- Fiscal Doc Link

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Bill of Lading

Figure 12-71 Bill of Lading Screen



The Bill of Lading screen contains information about the Bill of Lading (BOL) for the customer order delivery. It is accessed through the BOL Info menu option in the Footer menu on the Delivery Items screen.

Fields include:

- Bill of Lading
- Motive
- Pickup Date
- Dispatch Date
- Package Type – list of values. If Manifesting is being used (store admin), and if the carrier/service is configured to require package type, then the package type will be required.
- Weight – If Manifesting is being used (store admin), and if the carrier/service is configured to require weight, then the Weight will be required.
- Tracking ID – may be overwritten by the manifest system
- Type – Sender, Receiver, Third Party

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  - Defaulted to ‘Sender’ for Delivery type of ‘Ship to Customer’ and no carrier is identified on the order.
  - Defaulted to ‘Receiver‘ for Delivery Type of ‘Customer Pickup’ and no carrier is identified on the order.
- Carrier – list of carriers. The list is controlled by the data permission ‘Shipment Carrier’. Enabled and required for type of ‘Third Party’. If ‘other’ is selected then the Carrier Name and the Address are enabled. May be overwritten by the manifest system.
- Service – the list of services displayed is controlled by the data permission ‘Shipment Carrier Services’. Only enabled for type of ‘Third Party’. May be overwritten by the manifest system.

> **Note**
>
> In case the user does not have the permission for a carrier/service, the data will be view only and cannot be changed by the user.

- Carrier Name and Address – required when the carrier type is 'Third Party' and the carrier is 'Other'

Customer Order Reverse Picks

Canceling of customer orders can come in from an external system, such as an Order Management System. When this happens, a reverse pick list will be generated. If there are items that physically need to be unpicked, the user will action the reverse pick list which will then take the items that were canceled and move the picked quantities back to the appropriate area in the store. If the items that are being canceled are not picked, then the system generated reverse pick will just be created in a 'Completed' status with no action required through the application.

A system-generated reverse pick may also get created if the user rejects an open customer order.

A manual reverse pick might also be necessary. This happens when the user discovers that something which was picked has to be unpicked, maybe because it has been damaged. The manual reverse pick will reverse the pick quantities.

Note that reverse picking and canceling is more of an exception process.

Features:

- View customer order reverse picks
- Edit an existing customer order reverse pick
- Delete a customer order reverse pick
- Print a customer order reverse pick
- Create a customer order reverse pick

Manual Reverse Pick

- The user might want to create a manual reverse pick because something that was picked might have become damaged and therefore it must be unpicked.
- New Reverse Picks can only be created for Web Order customer orders that are in any status except 'New', 'Under Review mode but in New status', 'Completed' or 'Cancelled'.

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- There must be at least one item on the customer order with a physical picked quantity. By physical picked quantity it means a quantity that is still physically sitting there as picked, and it has not been delivered (which means shipped or picked up by the customer).
- Once the reverse pick is created, it will consist of all the items auto populated from the customer order fulfilment order including the substitute items.
- The Needed Reverse Pick Quantity will be set to zero for manual picks. For manual reverse picks, the quantity cannot exceed the physical picked quantity.

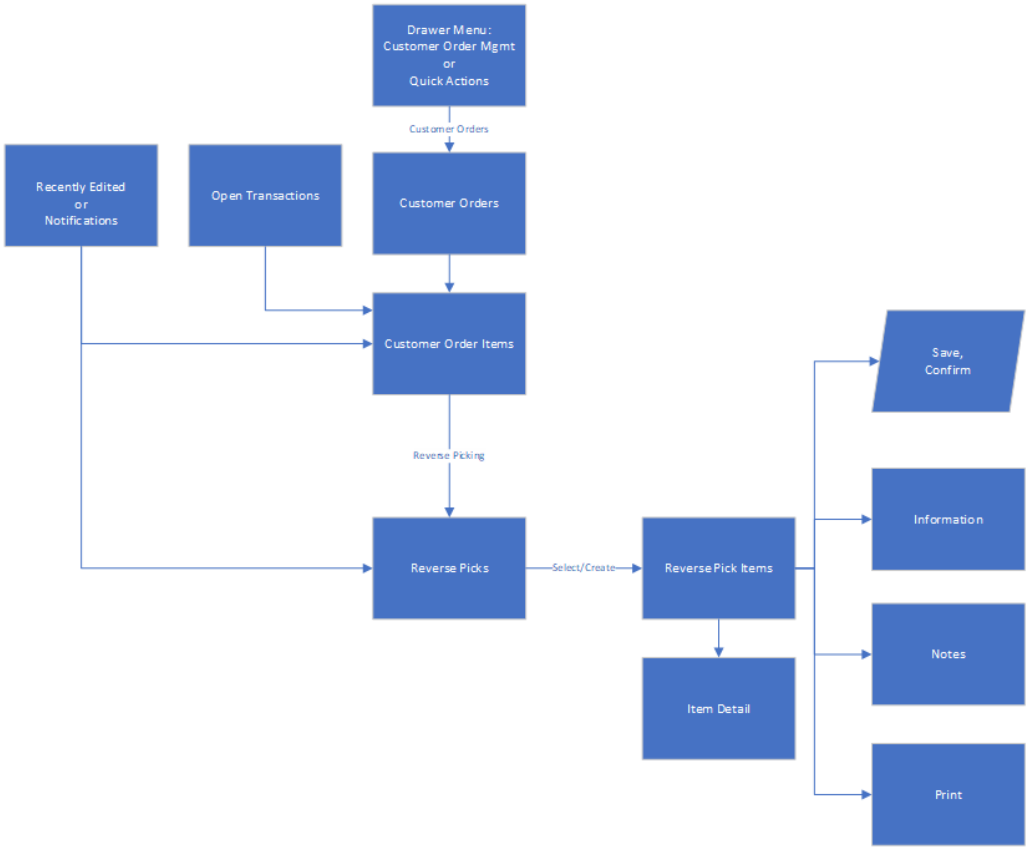
External System-Generated Reverse Pick

- When a system generated reverse pick is created, it will put all items on the reverse pick, including the substitute items. However, only those items that have a needed reverse pick quantity will be allowed to be reverse picked.
- The **Needed Reverse Pick Quantity** will be populated with what should be reverse picked based upon the cancellation from the external system. For externally system generated reverse picks, the Quantity cannot exceed the remaining quantity or the needed reverse pick quantity.
- If a cancellation comes into the system that is for more than what is remaining on the order, the cancellation will be rejected and a system-generated reverse pick will not be created.
- When creating the system generated reverse pick, the system will first try and cancel those items that have not been picked.
  - If this quantity is exceeded, it will cancel those items already picked.
  - When all items that are canceled have not been picked, there will not be anything to un-pick and therefore the reverse pick will be auto completed and put into a ‘Completed’ status and updates will happen to the customer order and inventory as stated below.

When some or all items that are canceled are picked, this creates a system generated reverse pick in ‘New’ status. This occurs so the user can action it and unpick the items. Updates will occur upon confirmation of the reverse pick as described below.

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Figure 12-72 Customer Order Reverse Picking Screen Flow

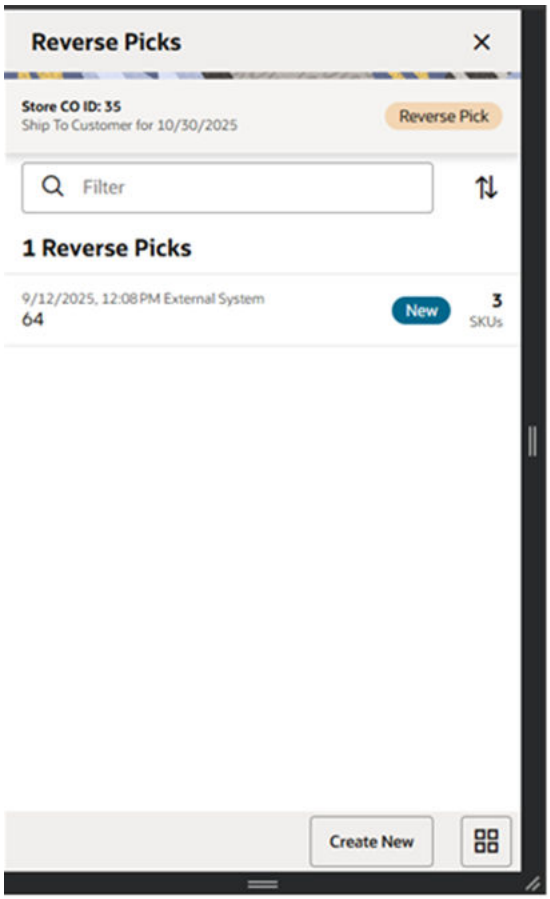


Customer order reverse picking will be accessed from within the Customer Order dialog on the Customer Order Items footer menu. It can also be accessed selecting an existing Reverse Pick in Recently Edited or if there is a Notification. Reverse Picks cannot be directly accessed from Open Transactions. Customer order reverse picks can be created and edited for web order types. Customer order reverse picking will allow for viewing, creating, saving, editing, confirming, and deleting of customer order reverse picks.

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Reverse Picks

Figure 12-73 Customer Order Reverse Picks Screen



The Reverse Picks screen is accessed by selecting the Reverse Pick menu option within the footer menu of a specific customer order. The list will contain all of the Reverse Picks for the specific Customer Order. The screen will list both externally created / system-generated reverse picks as well as manually created reverse picks. Reverse Picks are only available for web orders.

The Reverse Pick List screen lists reverse pick records for all statuses. Reverse Picks do not have a search criteria as there normally would not be that many reverse picks for a customer order fulfilment order to search for. There is however a filter, that allows filtering by: Reverse Pick ID, Create Date, Status, and User. A sort option is also available. Selecting a reverse pick record will navigate to the details on the Reverse Pick Items screen.

Fields include:

- Last Update Date
- User
- ID
- Status

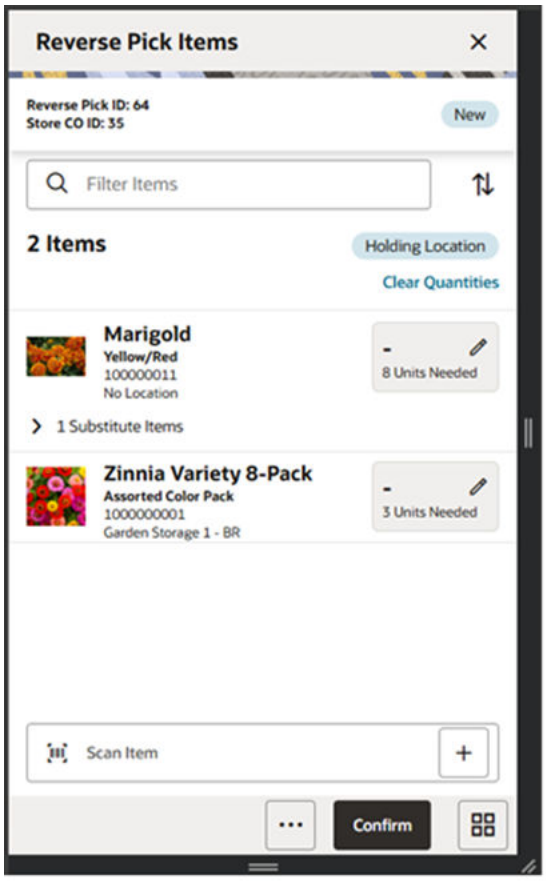
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- Number of SKUS

Finally, the user can create a new manually created reverse pick.

Reverse Pick Items

Figure 12-74 Reverse Pick Items Screen



The Reverse Pick Items screen is accessed by selecting an existing Reverse Pick from the Reverse Picks screen, or by creating a new Reverse Pick. It can also be accessed by selecting an existing Reverse Pick from Recently Edited or from within Notifications. Proper permissions must exist.

Selecting an item will navigate to the Item Detail (Customer Order Reverse Picking) screen for that item. Scanning an item will also navigate to the Item Detail screen for that item and the quantity may be updated per the quantity scanned or it will stay on the current screen and increment the quantity depending on the user preference **Scan Navigate** .

A Filter bar will allow to filter on: Item ID, Item Description and UOM. Sorting of the items is also available.

Header Fields include:

- Reverse Pick ID
- Store CO ID

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- Status – of reverse pick. ‘New’, ‘In Progress’, ‘Completed’, or ‘Canceled’.
- Number of Items
- Holding Location
- Default Quantities – defaults the quantity to what can be reverse picked
  - Manually Created – defaults to the physical pick quantity
  - System Generated – defaults to the needed (suggested) pick quantity. If there are substitutes, this option will not be available.
  - It will only update those items that do not have a quantity entered.
- Clear Quantities – will clear out all entered quantities on the reverse pick

Item Fields include:

- Item
- Item Description
- Item Image – per user preference
- Order Line – if the order contains duplicate line numbers
- Location – primary location for the item. Only displayed if ‘Display Sequence Fields’ is set to ‘Yes’.
- Need Reverse Pick Quantity – quantity suggested by the system. Only for system generated reverse picks
- Quantity – the quantity being reverse picked. Entered by the user.
- Pack Size

The items on the reverse pick are determined based upon the following rules:

- Manually created reverse picks will put only the items that:
  - have a physical pick quantity, meaning they have been physically picked and therefore can be reverse picked
  - OR, if there is reverse pick qty, meaning one had already been entered by the user on the reverse pick and saved (the PPQ may not exist any longer on the customer order depending on what has happened to the order)
- Externally generated (system) reverse picks will put all items on the reverse pick that have a needed (suggested) quantity. Meaning the items that are being canceled by the external system. If the item being cancelled has a substitute(s) those will be put on the reverse pick along with the original item.
- All ‘completed’ and ‘canceled’ status reverse picks will display all items from the customer order.

Confirm: will complete the Reverse Pick and move it to ‘Completed’ status

- Holding location may be required per store configuration ‘Holding Location Required’.
- For manual reverse picks:
  - The pick quantity on the customer order will be decremented by what was reverse picked.
  - The reserved quantity and the canceled quantity will not get updated as the items are not being canceled on the order, so they need to remain as reserved. They are simply being unpicked.
- For the externally (system) generated reverse picks:

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- The pick quantity will be decremented on the customer order.
- The reserved quantity (if it had been reserved) will be decremented by what was reverse picked and put back to the backroom.
- The Canceled quantity on the customer order will be incremented by the reverse picked quantity.
- If all items have been canceled and there have been no deliveries, the status of the customer order will move to ‘Cancelled’.
- If there is no remaining order quantity on the order, and some of the items have been delivered, the customer order will move to ‘Completed’ status.

Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Reverse Pick Items screen. The menu functions will include the following:

Notes: will access the notes common dialog to capture notes. The note will be saved on the customer order.

Print: will display the common print dialog to the report

Info: will access the Information popup

Holding Location: will display the holding location

Refresh: will refresh the reverse pick by getting the most current customer order/fulfillment order information. There may be other picks, deliveries, or cancellations that have occurred in the time the delivery was originally created.

Back: is only applicable to view only reverse picks and will exit to the Reverse Picks screen

Cancel: will exit to the Reverse Picks screen, and no changes will be saved.

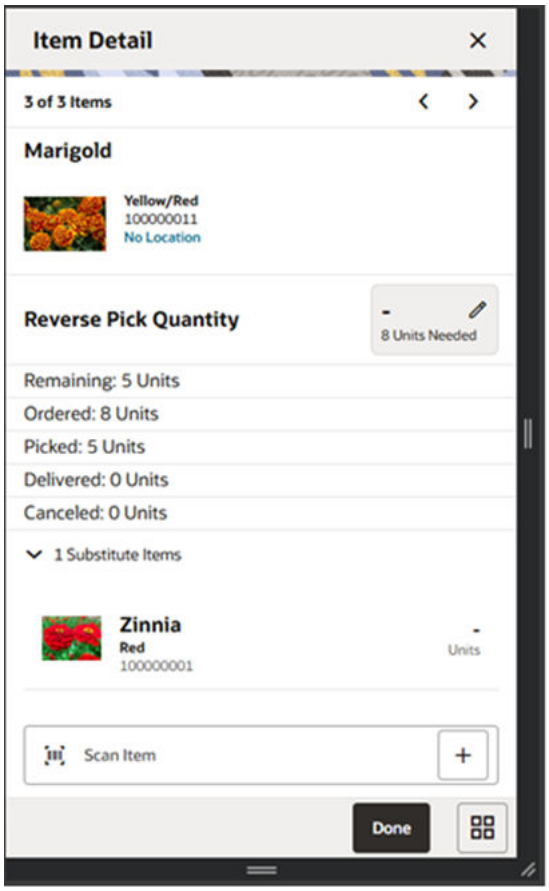
Delete: will allow deleting of an ‘In Progress’ status reverse pick and moves it to ‘Canceled’ status. The user will return to the Reverse Picks screen.

Save & Exit: will save the reverse pick as ‘In Progress’ status and return to the Reverse Picks screen

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Item Detail (Customer Order Reverse Picks)

Figure 12-75 Item Detail (Customer Order Reverse Picks) Screen



The Item Detail screen contains the details for the specific item on the customer order reverse pick. Entering/scanning an item on this screen will refresh the screen and update the item and the reverse pick quantity for the item.

The scan details at the top displays the details of the last scanned barcode. The arrows at the top allow the user to page to the next and previous items.

Fields include:

- Item ID and description
- Item Image (per user preference)
- Order Line – if the order contains duplicate line numbers
- Location – the primary location for the item. Tapping on this navigates to the Locations popup.
- Substitute For – will only be displayed if the item was added as a substitute for another item. This will show the original item that it was substituted for. Tapping on this field will navigate to the item details for that item.
- Reverse Pick Quantity – how many to be reverse picked by the user (editable)

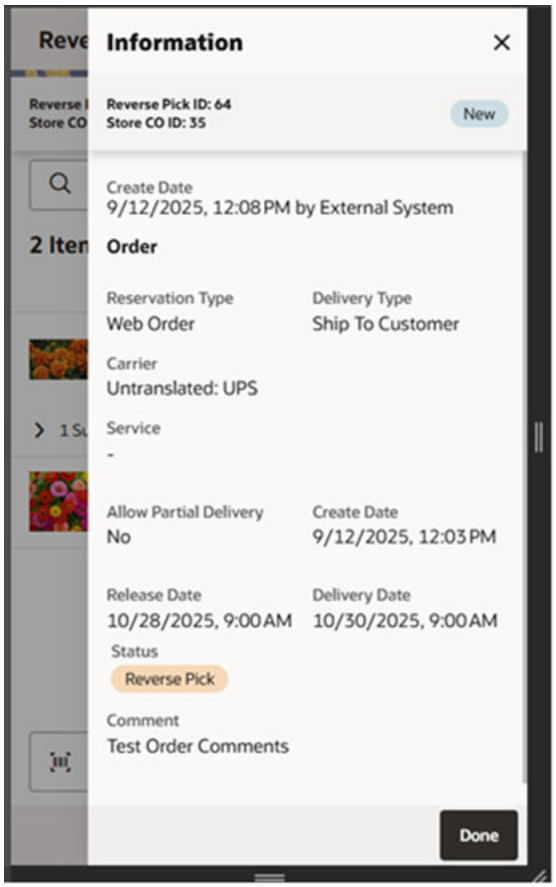
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  - Editing the quantity is controlled by security.
  - For manual reverse picks, the user must enter a quantity less than or equal to the physical pick quantity for the item.
  - For system generated (external) reverse picks the quantity must be less than or equal to the needed (suggested quantity) for items which are units. It must be less than or equal to the remaining quantity for variable UOM items (that is Kg, Lbs, and so on).
- Needed Reverse Pick Quantity – the quantity suggested by the system. Populated for system generated reverse picks and set to 0 for manually created reverse picks.
- Pack Size
- Remaining
- Ordered
- Picked
- Delivered
- Canceled
- <X> Substitutes – <*X*> is the number of substitutes for the item.
  - Selecting this expander icon will display the substitute items for this item.
  - Tapping on a substitute item will navigate to the details of that item.

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Info (Customer Order Reverse Picks)

Figure 12-76 Customer Order Reverse Picks Info Screen



The Info popup contains read-only information about the header level of the customer order reverse pick. It is accessed through the Info menu option in the Footer menu on the Reverse Pick Items screen. Reverse Pick information includes:

- Reverse Pick ID
- Status
- CFAs (Flexible Attributes) will be displayed. The user can capture CFAs on this screen. Security permission is needed for entering CFA values.
- Create Date/User

Order details include:

- Reservation Type
- Delivery Type
- Store Customer Order ID
- Customer Order ID
- Fulfillment Order ID

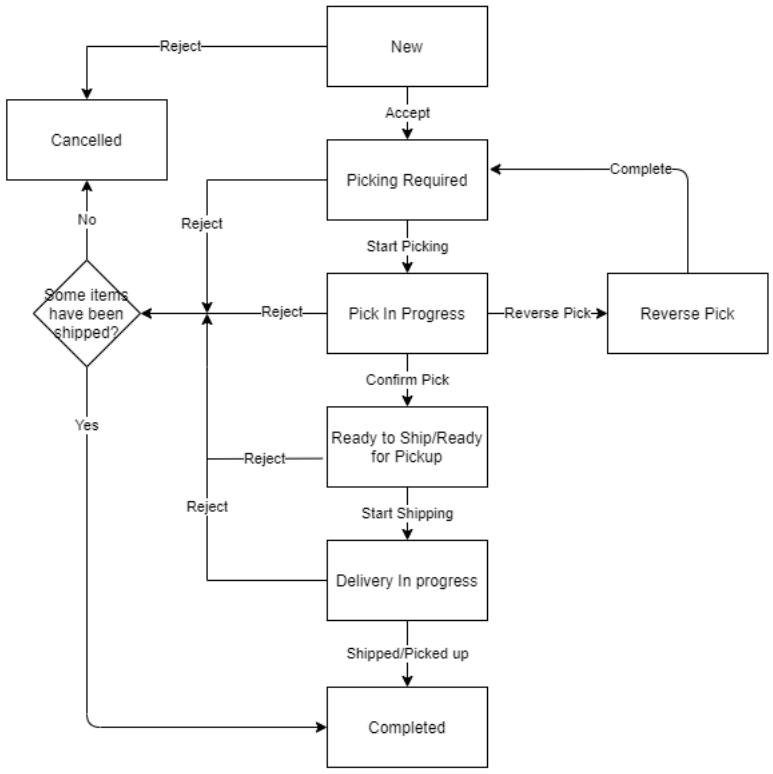
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- Create /Release/Delivery Date
- Allow Partial Delivery
- Status (order)
- Comment

Customer Order Status Flow

This flowchart shows a simple, straight forward status flow of a customer order when picking is required.

Figure 12-77 Customer Order Status Flow when Picking is Required



The following table shows the different statuses that a customer order can take when picking is required for the customer order:

Table 12-1 Customer Order Status when Picking is Required

Status	Meaning
New	The order is created but not been accepted yet at the store.
Picking Required	When no open pick exists and the Picked quantity is less than the Remaining quantity and Picking is required.
Pick in Progress	A pick is open for an order.

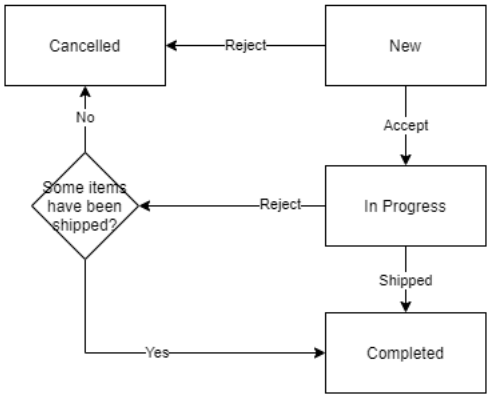
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Table 12-1 (Cont.) Customer Order Status when Picking is Required

Status	Meaning
Reverse Pick	A reverse pick is open for an order.
Ready to Ship	If the Picked quantity >= Remaining quantity and the order is not fully shipped yet and the order is of type 'Ship to Customer'.
Ready for Pickup	If the Picked quantity >= Remaining quantity and the order is not fully picked up yet and the order is of type 'Customer Pickup'.
Delivery in Progress	If at least one delivery is available which is either saved or submitted but not dispatched yet.
Completed	This is one of the final states of a customer order. When the customer order is fully shipped or picked up, it goes to 'Completed' status.
Cancelled	This is also one of the final states of a customer order. When the customer order is rejected or cancelled, it goes to 'Cancelled' status.

The following flowchart shows a simple, straight forward status flow of a customer order when picking is not required.

Figure 12-78 Customer Order Status Flow when Picking is Not Required



The following table shows the different statuses that a customer order can take when picking is not required for the customer order:

Table 12-2 Customer Order Status when Picking is Not Required

Status	Meaning
New	The order is created but not been accepted yet at the store.
In Progress	A customer order gets this status when it is being looked at and the order is not fully shipped by the store or picked up by the customer.
Completed	This is one of the final states of a customer order. When the customer order is fully shipped or picked up, it goes to 'Completed' status.
Cancelled	This is also one of the final states of a customer order. When the customer order is rejected or cancelled, it goes to 'Cancelled' status.

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Customer Order Status Update Logic

Picking Required for Customer Orders is set to Yes

When the store parameter **Picking Required for Customer Orders** is set to **Yes**, the status of customer orders will need to be checked for update whenever any of the following events occur on the customer order.

1. When the customer order is accepted at the store.
2. When a Reverse pick is saved, completed or cancelled, both internally in the system and externally.
3. When a pick is created, saved, completed or cancelled.
4. When a delivery record is created, cancelled, saved, submitted or partially/fully dispatched.
5. When POS sends a fulfilment record against the customer order, which partially/completely fulfilled the order.
6. When the customer order is rejected by the store or cancelled by the user or at Order management system.

> **Note**
>
> These events can be a manually created, system generated, internally created or externally created event.

After any of the events mentioned above occur, perform the following:

For the Customer Order, check if there is at least one open reverse pick exists:

If **Yes**, update the status of the customer order to **Reverse Pick**.

If **No**, check if there is a Pick in Progress, that is, Pick's status = **New** or **In progress**.

- If **Yes**, update the status of the customer order to **Pick In Progress**.
- If **No**, check if there is a Delivery In Progress, that is, at least one delivery which is either saved or submitted and not dispatched yet.
  - If **Yes**, update the status of the customer order to **Delivery In Progress**.
  - If **No**, check the Picked Qty of the items on the customer order.
    - If **Allow Partial Delivery = No**,

      If at least one item is not completely picked, update the status to **Picking Required**.

      If all items are picked completely, then:

      if the order is of type Ship to Customer, update the status of customer order to **Ready to Ship**, or,

      if the order is of type Customer Pickup, update the status of customer order to **Ready for Pickup**.
    - If **Allow Partial Delivery = Yes**,

      If no item is picked yet, update the status to **Picking Required**.

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If at least one item is picked partially or completely picked, then:

if the order is of type Ship to Customer, update the status of customer order to **Ready to Ship**, or,

if the order is of type Customer Pickup, update the status of customer order to **Ready for Pickup**.

Picking Required for Customer Orders is set to No

When the store parameter **Picking Required for Customer Orders** is set to **No**, the following is true:

If the store has decided to not pick the items before shipping, then if the Customer Order is accepted, the status will show **In Progress**.

If the store has decided to formally pick the items and ship, the status is derived as per the rules that apply when **Picking Required** is set to **Yes**.

Completed and Cancelled

Completed and **Cancelled** are the final states of a customer order, irrespective of whether picking is required or not.

The customer order moves into **Completed** status when:

- a customer order is completely shipped by the store or picked up by the customer
- a customer order is rejected and some items have been delivered already

The customer order moves into **Cancelled** status when:

- a customer order is rejected and none of the items have been delivered
- a customer order is cancelled by the user or at the Order management system

The customer order will become read-only once it reaches either **Completed** or **Cancelled** status.

Under Review Status

When the retailer has chosen to integrate with OBCS (Order Broker Cloud Services) and whenever a customer order goes through payment reauthorization, the Order Broker system informs the Store Inventory system about it and the status of the customer order would move to 'Under Review'. This is to indicate that the customer order is going through payment reauthorization and it is not in the state to be submitted/dispatched. The Store Inventory system would have to wait for the payment reauthorization to be successful in order to submit/dispatch the customer order.

> **Note**
>
> The status of the customer order is not updated to 'Under_Review' at DB rather the status displayed in the UI alone would show 'Under_Review'.

When the customer order moves to 'Under Review' mode, the user can still perform the same actions on the customer order as if it is in New/In Progress/Picking Required/Delivery In Progress, Ready to Ship/Ready for Pickup/Reverse Pick status. that is, the user will be able to approve/reject, create pick/reverse pick/delivery and so on, A validation will be done on

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Submit/Dispatch of customer order deliveries to ensure that the customer order is not in 'Under Review' mode.

Whenever OBCS informs Store Inventory system that the payment reauthorization has been successful, the status of the customer order moves back to its previous status or to an appropriate status based on the activities that had happened on the customer order while it was in 'Under Review' mode. The customer order would now be available for submit/dispatch. If the payment reauthorization fails, the customer order would get cancelled.

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13

Item Basket

Item Basket is a way of creating a list of items that can be utilized for other things such as line busting, gift registries, and so on. Item Basket allows a user to capture items and their quantities.

> **Note**
>
> An item basket that has only items on it is considered 'static' meaning that the number of items does not change. An item basket that has only hierarchies or hierarchies and items is considered 'dynamic' meaning that the items on the basket can change based upon the items associated to the hierarchy. The desktop allows for item baskets that are 'dynamic' or 'static' to be created, viewed and edited. Whereas, on the mobile application only static item baskets (ones with items) can be created, viewed, and edited.

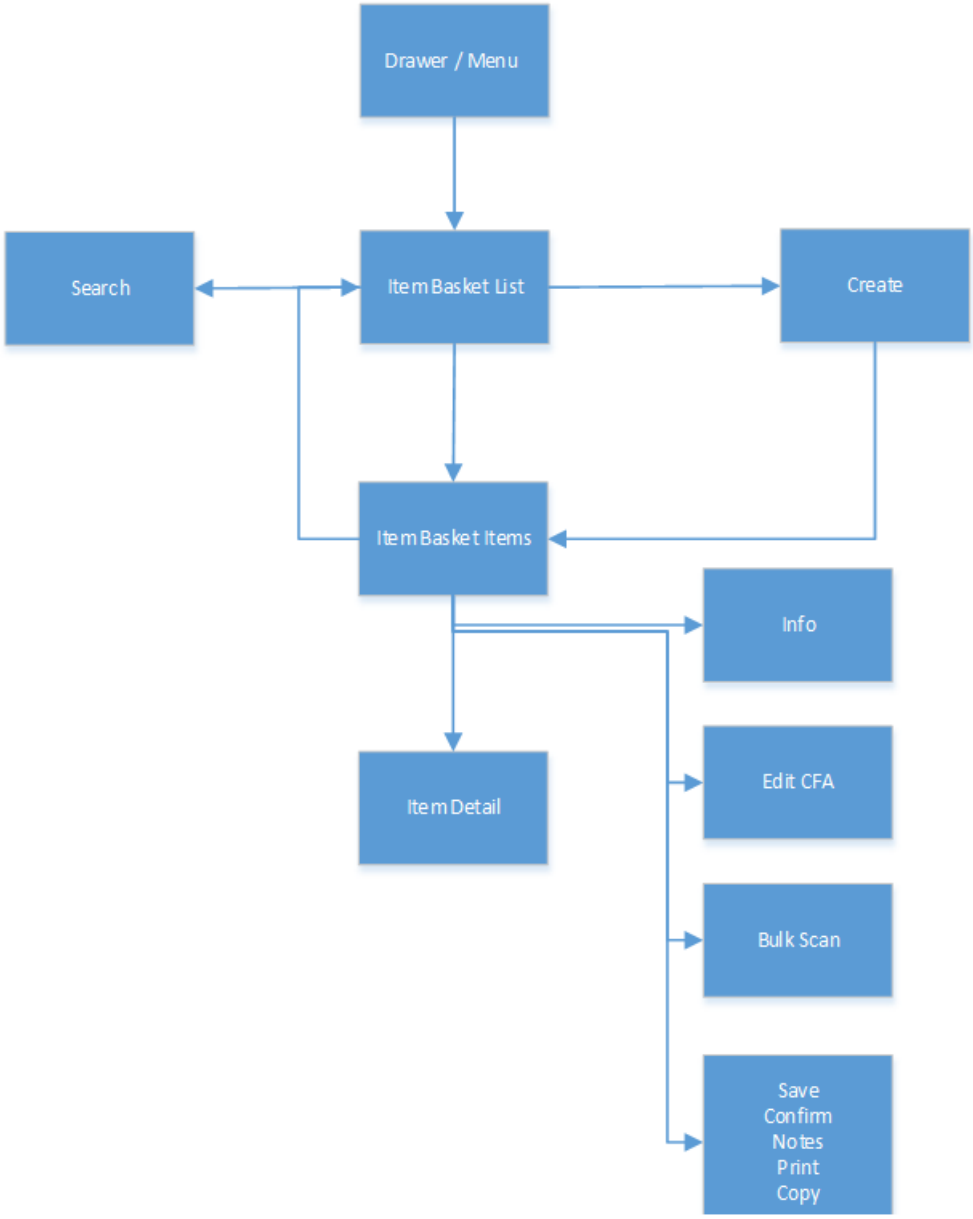
Features:

- Create a new item basket
- View or edit and existing item basket
- Delete an In Progress Item Basket
- Copy a Completed Item Basket

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Item Basket MAF

Figure 13-1 Item Basket Mobile Screen Flow

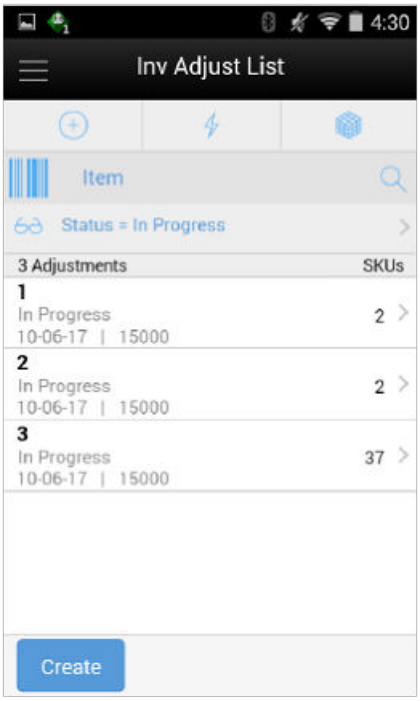


Item Basket is accessed through the Item Basket menu within the drawer. Selecting the menu option takes the user to the Item Basket List screen. On this screen, the option is given to search for Item Basket records which will be presented on the Item Basket List screen. From here one can edit or view an item basket, or create an item basket, in all cases the user is directed to the list of items on the Item Basket Items screen. The user can select an existing item or scan/enter a new item directing to the Item Detail screen where functions allow the user to add, view, and edit the details of the items. The user can specify values for CFAs (Custom Flexible Attributes) that have been setup for the item basket within the Edit CFAs screen. Lastly, additional functions will include Notes, Print, Copy, Delete, Save, and Confirm.

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Item Basket List

Figure 13-2 Item Basket List Screen



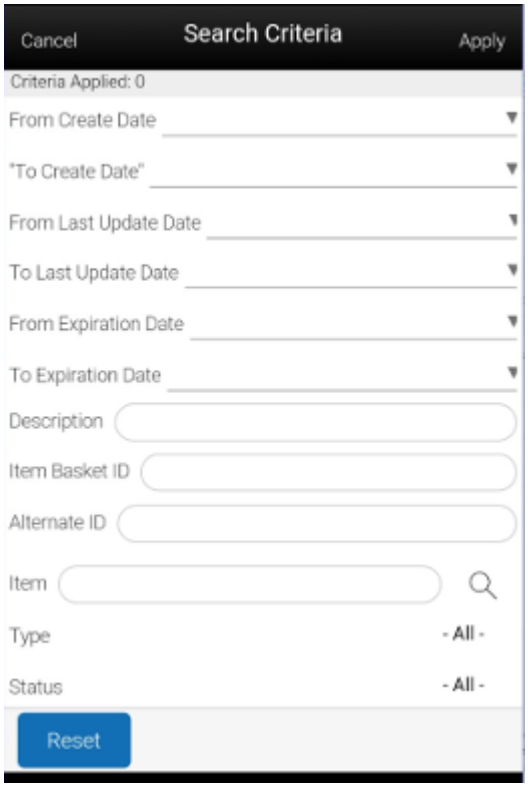
When navigating to **Item Basket**, the **Item Basket List** screen displays the **In Progress** item baskets as the default list. The user can use the search criteria eye glasses to navigate to the Search Criteria (Item Basket) screen to enter search criteria for item baskets. When scanning/ entering an item in the scan bar, the system adds the item to the entered search criteria and narrows down the current list of item baskets.

Creating a new item basket navigates to the Create Item Basket popup to enter in header level information, and then it will navigate to the Item Basket Items screen with no details (items) to build a new item basket. Selecting an item basket from the list navigates directs the user to the details for that item basket.

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Search Criteria (Item Basket)

Figure 13-3 Search Criteria Screen (Item Basket)

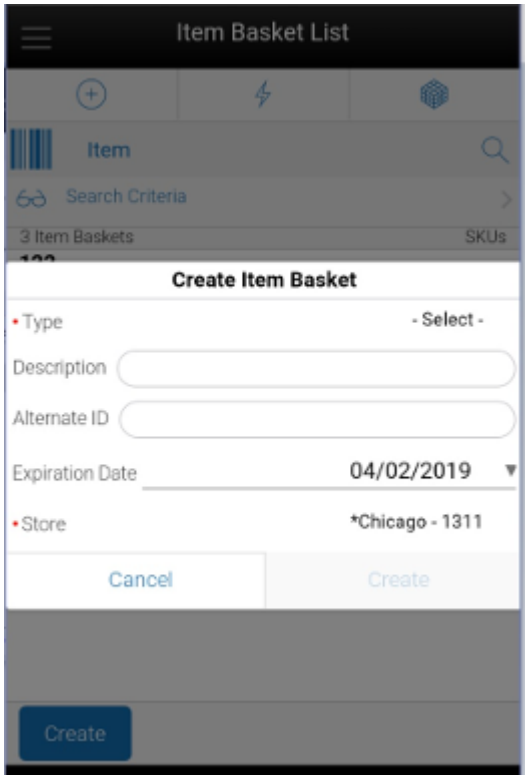


The **Item Basket Search Criteria** screen is accessed by the eye glasses on the Item Basket List screen. After applying the search criteria, the results are listed on the Item Basket List screen and the criteria applied is shown.

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Create Item Basket

Figure 13-4 Create Item Basket



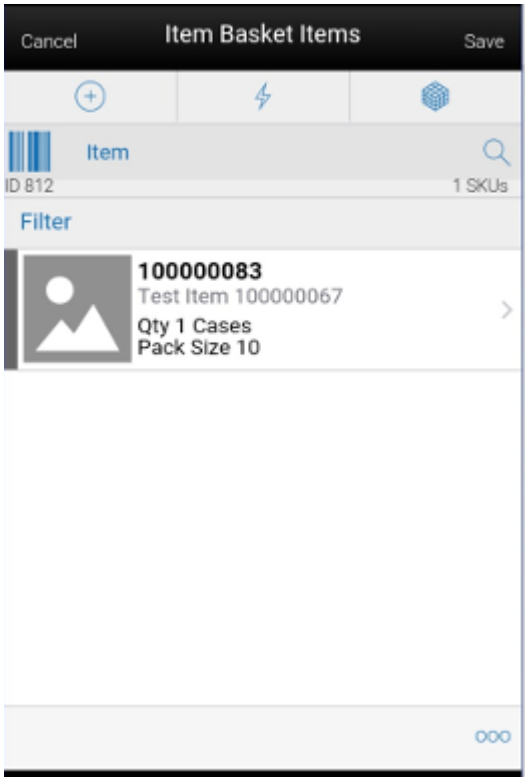
The **Create Item Basket** screen is used when creating a new item basket and it is accessed when selecting **Create** from the Item Basket List screen. All item baskets created on mobile will be static. A user must have create permissions to create a new item basket. The type of item basket is required to be selected from the list. The type is populated from the list of item basket types defined in **Code Info** dialog within the desktop application.

Description is an optional text field to describe the item basket. **Alternate ID** is also an optional field to hold an alternate ID given to the item basket by the user, different from that of the system generated item basket ID. **Expiration date** is a field to hold an optional expiration date used to update item baskets to 'canceled' status when the expiration date has passed. Lastly, the store field is required and the options will include the user's store or 'All Stores'. 'All Stores' is only available to users that have the proper permission, and this option will allow for the creation of item baskets in which all stores would have access to use.

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Item Basket Items

Figure 13-5 Item Basket Items Screen



The Item Basket Items screen is where a new item basket is created. Initially, this screen will not have any items. The items screen is also displayed when selecting an existing item basket transaction from the Item Basket List. The items are listed for the item basket. The item image for the line items is displayed per configuration.

Line items appear in a list and selecting a line item navigates to the item details of that item. If an item has been changed in the current session, it is indicated by a bar on the left of the item. Scrolling in the list of items displays a filter. The filter can be used to narrow down the list of items. Filtering can occur by item ID and description.

Scanning or entering an item in the scan bar navigates you to the Item Detail screen for that item. The quantity may be updated depending on the scan mode. If the scan type is 'Bulk Scan' the user will navigate to the Bulk Scan screen.

The ellipsis in the lower right hand corner accesses the footer menu which contains all of the functions that can be performed on an item basket.

Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Item Basket Items screen. The menu functions include the following:

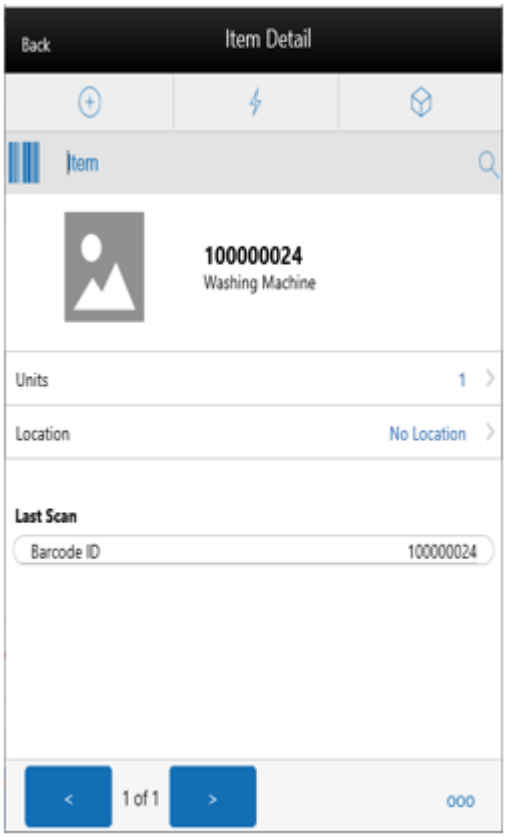
- **Info**: Accesses the Info popup.
- **Notes**: Accesses the notes dialog to capture notes.

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- **Bulk Scan**: Bulk Scan will navigate to the Bulk Scan screen. User must have proper permissions.
- **Edit Item Baske**t: The Edit Item basket option navigates to the Edit Item Basket screen. User must have proper permissions.
- **Edit CFAs**: Lets the user enter values for the CFAs that are set up for Item Basket.
- **Copy**: The copy function is only available for those item baskets in a 'Completed' status. It takes the current item basket, copies the items and quantities, and creates a new editable item basket with a new ID. It references the copied item basket's ID.
- **Confirm**: Confirms and completes the Item Basket setting it to 'Completed' status.
- **Save**: Saves the item basket in 'In Progress' status to be completed later.
- **Delete**: Marks the item basket to 'Canceled' status.
- **Cancel**: Exits the item basket; changes made in that session are not saved.
- **Print**: Displays the common print dialog to print the item basket report.

Item Detail

Figure 13-6 Item Detail Screen (Quantity)



The Item Detail screen is used for selecting or scanning an item from the Item Basket Items screen. Scanning or entering an item on this screen in the scan bar, updates the quantity per the scan mode and refreshes the Item Detail screen for the item and quantity scanned.

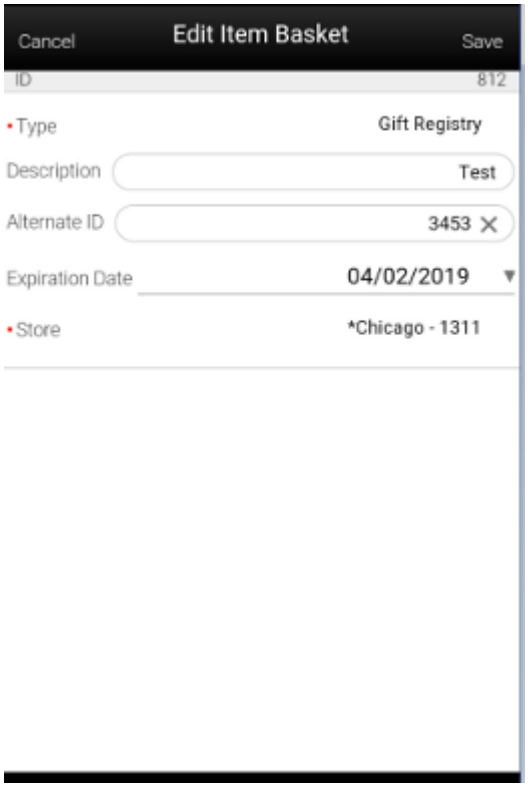
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The quantity can be edited and updated manually if permissions allow. The item information including the image (which is system configured) displays in the header. The bottom portion of the screen contains fields for quantity with UOM, pack size, and location. The Last Scan will display the contents of the last entered or scanned barcode. It is purely informational.

The footer menu, ellipsis button, contains a reset function as well as remove and restore functions. You can page through existing items on the item basket using the arrows on the bottom.

Edit Item Basket

Figure 13-7 Edit Item Basket Screen

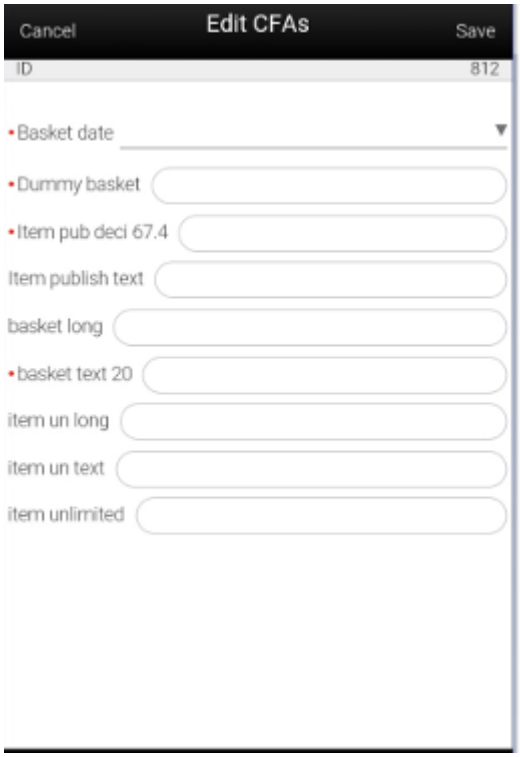


The Edit Item Basket screen is used to edit header level information about the item basket. Edit Item Basket is accessed by selecting **Edit Item Basket** from within the footer menu of Item Basket Items, and a user must have proper permissions. The fields are the same as those on the Create Item Basket screen and include: type, description, alternate ID, expiration date, and store.

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Edit CFAs

Figure 13-8 Edit CFAs Screen



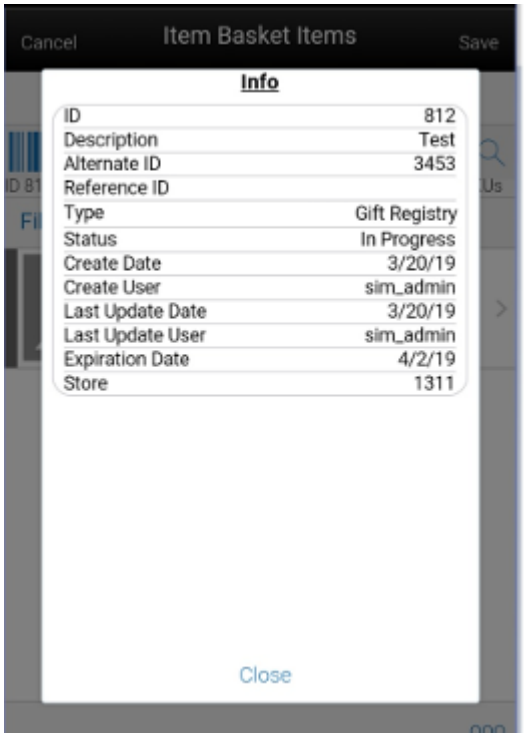
The Edit CFAs screen displays the list of CFAs (flexible attributes) that have been set up for Item Baskets in the desktop application and lets the user enter values for them. It is accessed by selecting the **Edit CFAs** menu option within the footer of Item Basket Items and the user must have proper permissions.

The CFAs that are set up as being required must have a value entered for it before confirming the item basket. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs defined during setup in the desktop application. Appropriate security permission is needed for entering CFA values.

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Info Screen (Item Basket)

Figure 13-9 Item Basket Items Info Screen



The Info screen is an informational popup that contains read-only information about the header level of the item basket. Info is accessed by selecting **Info** from within the footer menu of Item Basket Items. Details include ID, description, alternate ID, reference ID, type, status, create date/user, last update date/user, expiration date, and store and the CFAs that have a value.

Bulk Scanning

Bulk scanning is the ability to be able to enter/scan one or more items on a transaction and apply them to the transaction all at once or in bulk. This enables retailers the ability to use RFID to scan many items to add to a transaction.

From the <transaction> items (Item Basket Items) screen, if the scan type is **Bulk**, after entering/scanning one or many items the user will be directed to the Bulk Scan screen. On the Bulk Scan screen, a counter will tally total, valid, invalid, and expected scans. The Bulk Scan screen can also be accessed via the **Bulk Scan** menu option from the footer menu on the <transaction> items screen.

Once on the Bulk Scan screen items can continue to be entered/scanned as well as the option to import an item basket.

Selecting the **Items** option from the footer menu will direct the user to the Bulk Items screen which will list all items that have been collected. Here the user can remove items from the bulk collection if necessary. Once complete, the user can select **Apply** and the system will apply the items and navigate back to the <transaction> items screen. Bulk scanning is currently used within Item Basket.

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Bulk Scan

Figure 13-10 Bulk Scan Screen



The Bulk Scan screen can be accessed via the Bulk Scan footer menu option from the Item Basket Items screen if the user has proper security permissions. It can also be accessed when scanning/entering an item from the Item Basket Items screen when the scan type is set to **Bulk**. The Bulk Scan screen allows a user to enter/scan in multiple items at once (that is, RFID) or one by one. In both scenarios the system will gather the items and create a counter of the "scans" including: total, valid, and invalid as well as the total quantity. The system does not apply any validations when items are entered/scanned. Validation does not take place when scanning/entering an item on this screen. The validation takes place once all of the bulk scanning is complete and the user chooses to apply the items to the transaction.

Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Bulk Scan screen. The menu functions include the following:

- **Items**: Navigates to the Bulk Items screen to view the items that were scanned/entered on the Bulk Scan screen.
- **Import Basket**: Navigates to the Select Item Basket screen to import an item basket into the Bulk Scan screen. Only 'static' item baskets can be imported.

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- **Apply**: Takes all of the items that were scanned/entered, as well as imported item baskets, and executes the item validations and applies the items to the transaction and the user is returned to the Item Basket Items screen with items in the list.
- **Clear**: Clears out all of the items that were scanned/entered or imported from an item basket. All of the counters on the Bulk Scan screen are re-set to zero.
- **Back**: Navigates back to the Item Basket Items screen and the items that were scanned/entered or imported via an item basket are saved to the Bulk Scan.

Bulk Items

Figure 13-11 Bulk Items Screen

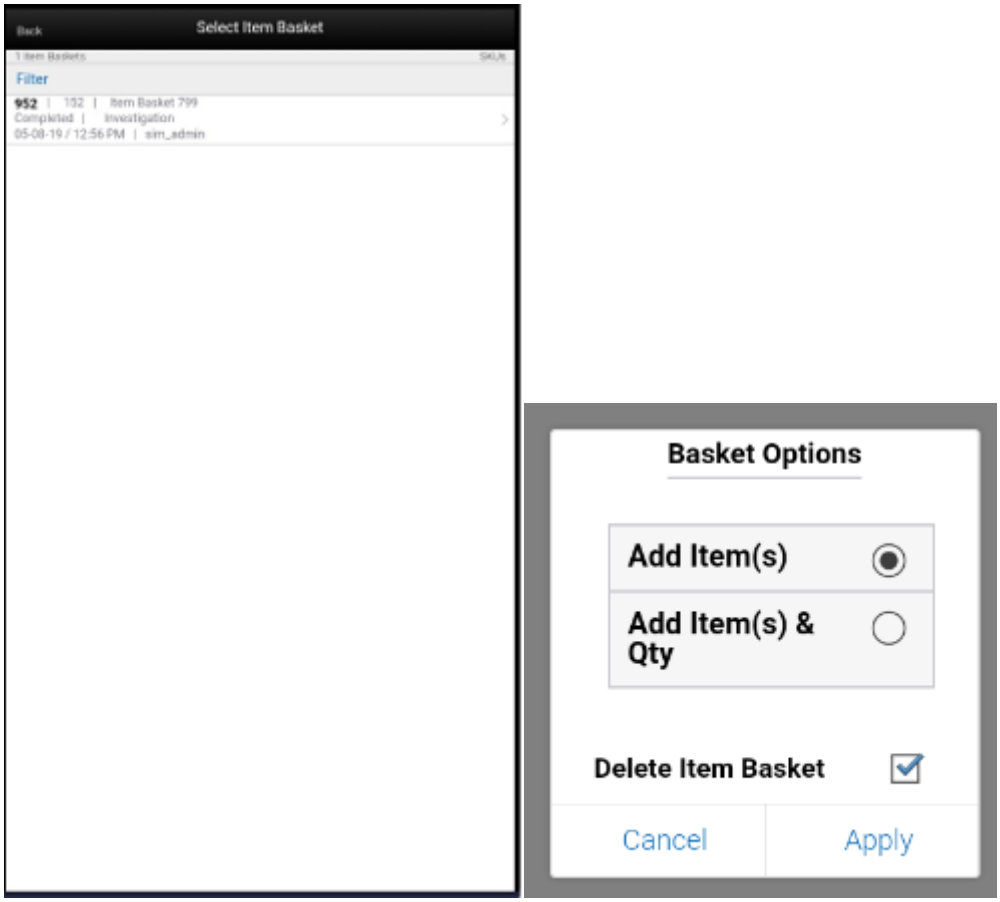


The Bulk Items screen is accessed via the **Bulk Items** menu option within the footer on the Bulk Scan screen. This screen lists all of the items that have been entered/scanned or imported from an item basket on the Bulk Scan screen. There is a filter at the top of the screen to allow for filtering on item ID and item description. The user is able to delete items that are not needed on the transaction. Deleted items can be restored if accidentally deleted. Save will save the deletions made and return to the Bulk Scan screen.

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Select Item Basket

Figure 13-12 Select Item Basket Screen

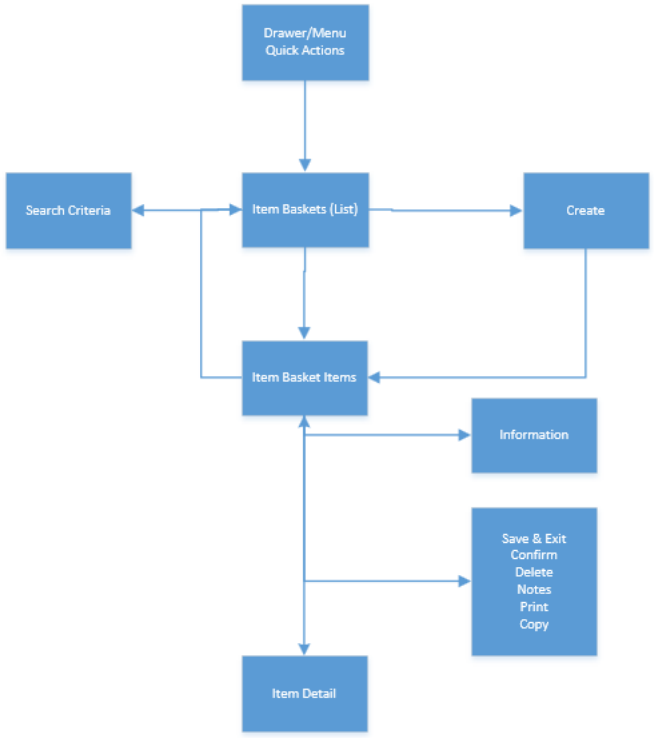


The Select Item Basket screen is accessed via the **Import Item Basket** footer menu option on Bulk Scan. This screen allows a user to import a 'completed' status item basket that was created for the user's store or All Stores. Upon selecting the item basket the user will be given the option to add only the items without the quantities or add the items with the quantities to the bulk scan. A **Delete Item Basket** check box is available which will set the selected item basket to 'canceled' status upon import. This allows those item baskets that are no longer of use to not show up in the list anymore and it will get picked up in the purge.

Item Basket JET Mobile

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Figure 13-13 Item Basket Mobile Screen Flow

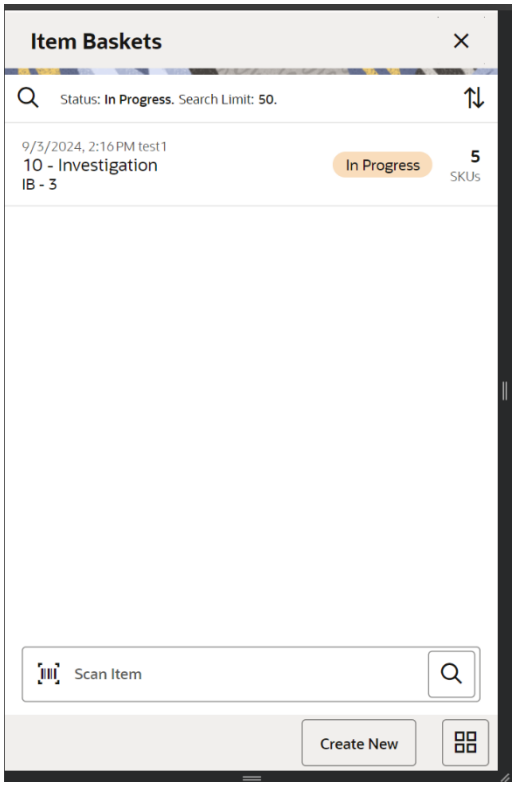


Item Basket is accessed through the Item Basket menu within the drawer or from Quick Actions. Selecting the menu option takes the user to the **Item Baskets** (List) screen. On this screen, the option is given to search for Item Basket records which will be presented on the Item Baskets (List) screen. From here one can edit or view an item basket, or create an item basket. In all cases the user is directed to the list of items on the Item Basket Items screen. The user can select an existing item or scan/enter a new item directing to the Item Detail screen where functions allow the user to add, view, and edit the details of the items. The user can specify values for CFAs (Custom Flexible Attributes) that have been setup for the item basket within the Information screen. Lastly, additional functions will include Notes, Print, Copy, Delete, Save, and Confirm.

Item Baskets

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Figure 13-14 Item Baskets Screen



When navigating to **Item Basket**, the **Item Baskets** screen displays the **In Progress** item baskets as the default list. The list can be sorted by selecting the sort icon.

A search can be done by selecting the magnifying glass to navigate to the Search Criteria (Item Basket) screen to enter search criteria for item baskets. The user will return to the **Item Baskets** (list) screen with the search updated.

When scanning/ entering an item in the scan bar, the system adds the item to the entered search criteria and narrows down the current list of item baskets.

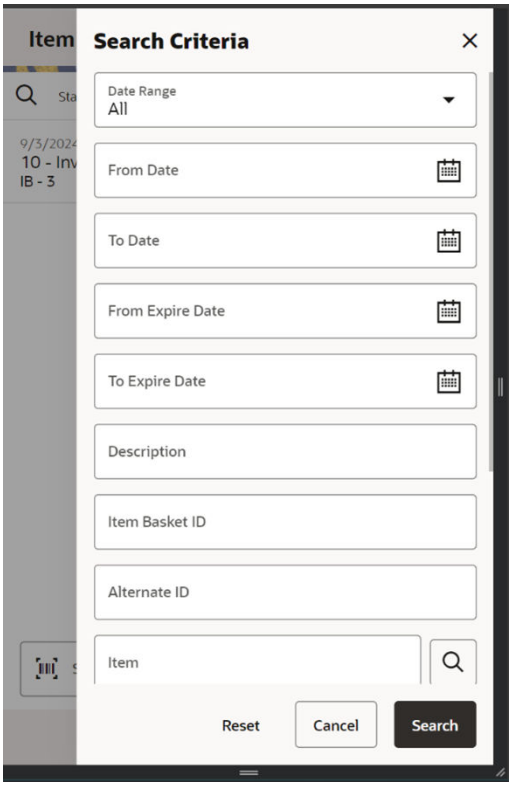
Creating a new item basket navigates to the Create Item Basket popup to enter in header level information for the newly created basket. Selecting an item basket from the list navigates directs the user to the details for that item basket.

Details on the list include: Last Update Date, User, ID, Type, Basket Description, Status, and Number of SKUs.

Search Criteria (Item Basket)

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Figure 13-15 Search Criteria Screen (Item Basket)



The **Item Basket Search Criteria** screen is accessed by the magnifying glass on the Item Baskets screen. After applying the search criteria, the results are listed on the Item Baskets screen and the criteria applied is shown.

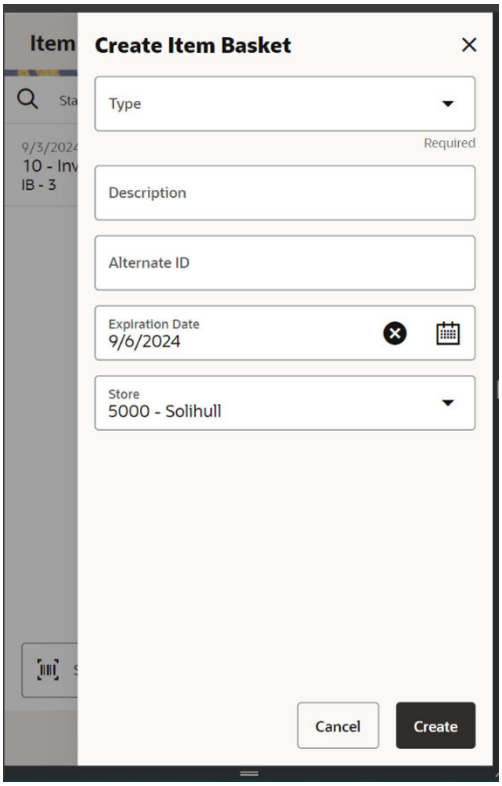
Criteria include:

- Date Range – based on the Last Update Date
- From / To Date – based on the Last Update Date
- From Expiration / To Expiration
- Description
- Item Basket ID
- Alternate ID
- Item
- Type
- Status
- User – with a search and an "Apply My User ID"
- Search Limit – defaulted per system config and can be updated.

Create Item Basket

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Figure 13-16 Create Item Basket Screen



The **Create Item Basket** screen is used when creating a new item basket and it is accessed when selecting **Create New** from the **Item Baskets** (list) screen. All item baskets created on mobile will be static.

> **Note**
>
> A user must have create permissions to create a new item basket.

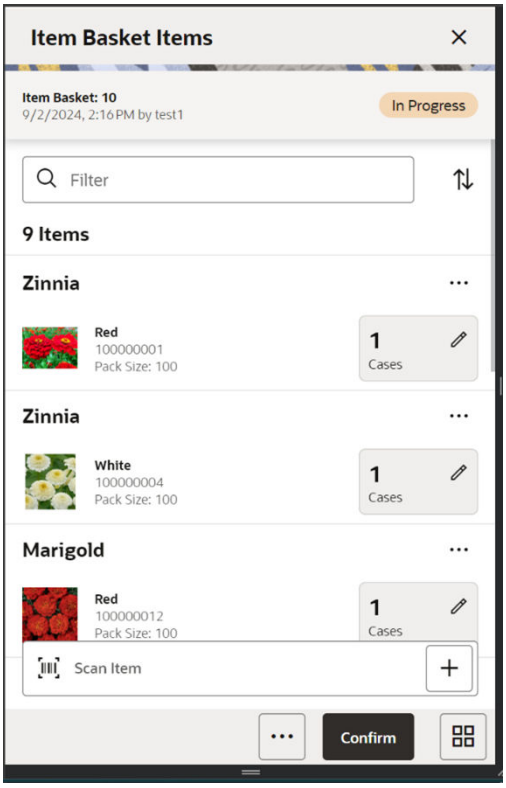
The **Create Item Basket** screen shows the following fields:

- **Type** – type of item basket is required to be selected from the list. The type is populated from the list of item basket types defined in **Code Info** dialog within the desktop application.
- **Description** – is an optional text field to describe the item basket.
- **Alternate ID** – is an optional field to hold an alternate ID given to the item basket by the user, different from that of the system generated item basket ID.
- **Expiration date** – is an optional field for the expiration date. It is used to update item baskets to 'canceled' status when the expiration date has passed. This occurs via a batch process.
- **Store** – the store field is required and the options will include the user's store or 'All Stores'. 'All Stores' is only available to users that have the proper permission, and this option will allow for the creation of item baskets in which all stores would have access to use the item basket.

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Item Basket Items

Figure 13-17 Item Basket Items Screen



The **Item Basket Items** screen is where the details or line items for the item basket are displayed. When creating a new item basket, initially, this screen will not have any items.

The screen is displayed when selecting an existing item basket transaction from the **Item Baskets** (list) screen as well as from **Open Transactions** and **Recently Edited**. The items are listed for the item basket.

Line items appear in a list and selecting a line item navigates to the item details of that item. Scrolling in the list of items displays a filter. The filter can be used to narrow down the list of items. Filtering can occur by item ID, item description, and UOM.

Selecting a line item navigates to the item details of that item. Scanning or entering an item in the scan bar will navigate the user per the User Preference, Scan Navigate. The user will either go to the Item Detail for the item or stay on the Item Basket Items screen. The quantity may be updated depending on the scan mode.

Fields include: The item image for the line items is displayed per user preference. Item ID, description, quantity, UOM, and pack size.

All items are allowed on an item basket: any status, consignment/concession, non-inventory and non-ranged. Non-ranged items will be addressed at the time the item basket is being used.

Confirm: Confirms and completes the Item Basket setting it to 'Completed' status.

Footer Menu

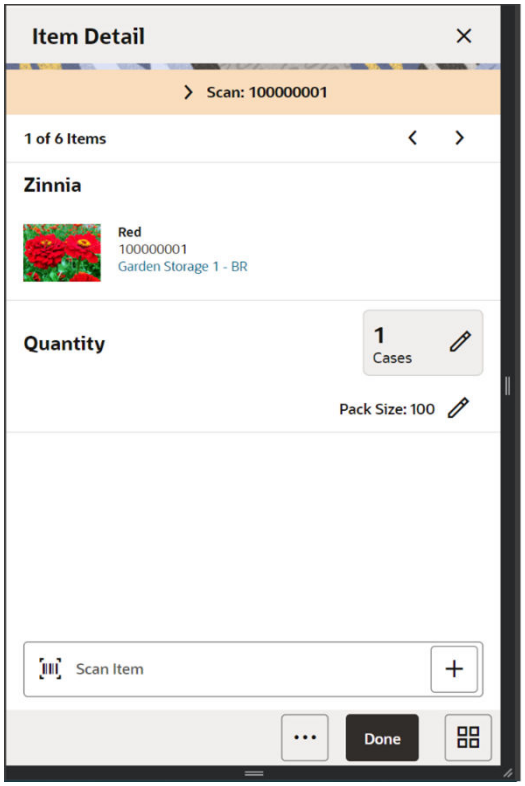
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The footer menu is accessed from the ellipsis footer menu on the Item Basket Items screen. The menu functions include the following:

- **Notes**: Accesses the notes dialog to capture notes.
- **Print**: Displays the common print dialog to print the item basket report.
- **Info**: Accesses the Info popup.
- **Cancel**: Exits the item basket; changes made in that session are not saved.
- **Delete**: Marks the item basket to 'Canceled' status. Item Basket must be in ‘In Progress’ or ‘Completed’ status.
- **Copy**: The copy function is only available for those item baskets in a 'Completed' or ‘Canceled’ status. It takes the current item basket, copies the items and quantities, and creates a new editable item basket with a new ID. It references the copied item basket's ID.
- **Save and Exit**: Saves the item basket in 'In Progress' status to be completed later.

Item Detail

Figure 13-18 Item Detail Screen



The **Item Detail** screen is navigated to by selecting an item from **Item Basket Items** or by entering/scanning an item based upon Scan Navigate user preferences. Scanning or entering an item on this screen in the scan bar, updates the quantity per the scan mode and refreshes the Item Detail screen for the item and quantity scanned.

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The header contains the Scan Details which will display the contents of the last entered or scanned barcode. It is purely informational. There is also paging, where you can page through existing items on the item basket using the arrows.

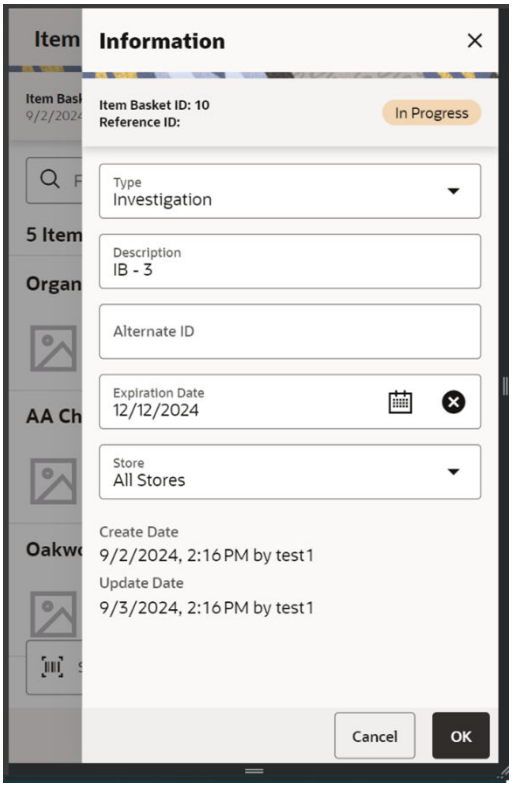
The item information including the image (which is user preference) displays in the header along with Item ID, description, and location (primary). The location is only displayed if the Display Sequence Fields system setting is set to 'Yes'. Selecting the location will display the Item Locations screen within Item Lookup.

The quantity is displayed with UOM and Pack Size (for cases) and can be edited and updated manually if permissions allow.

The footer menu, ellipsis button, contains a delete function which allows the item to be removed from the Item Basket.

Information Screen (Item Basket)

Figure 13-19 Item Basket Information Screen



The **Information** screen contains header level information about the item basket. Information is accessed by selecting **Info** from within the footer menu of Item Basket Items screen.

Details include ID, status, reference ID, alternate ID, description, type, expiration date, store, create date/user, and last update date/user.

The CFAs that are set up as being required must have a value entered for it before confirming the item basket. The value can be one of the following: Date, Text, Decimal, Long depending

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on the 'data type' set up for the CFAs defined during setup in the desktop application. Appropriate security permission is needed for entering CFA values.

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14

Ticketing

Ticket printing on the mobile application is accessible from Inventory Management/Print Item menu. The system supports two types of ticketing that is, Item Ticket and Shelf Label. There are two modes of printing tickets, auto print and manual print.

The user is taken to the Auto Print Mode by default when the dialog is accessed. In auto print mode, the user can print tickets quickly with the pre-defined attributes by just scanning or entering the items. The user can change the ticket attributes or switch to the Manual mode using the Default Attributes option.

In manual print item mode, the user can pre-set the type, format, override price, quantity and change the attributes if required for every ticket on the fly. The user can select the country of manufacture for the ticket.

There are two sections:

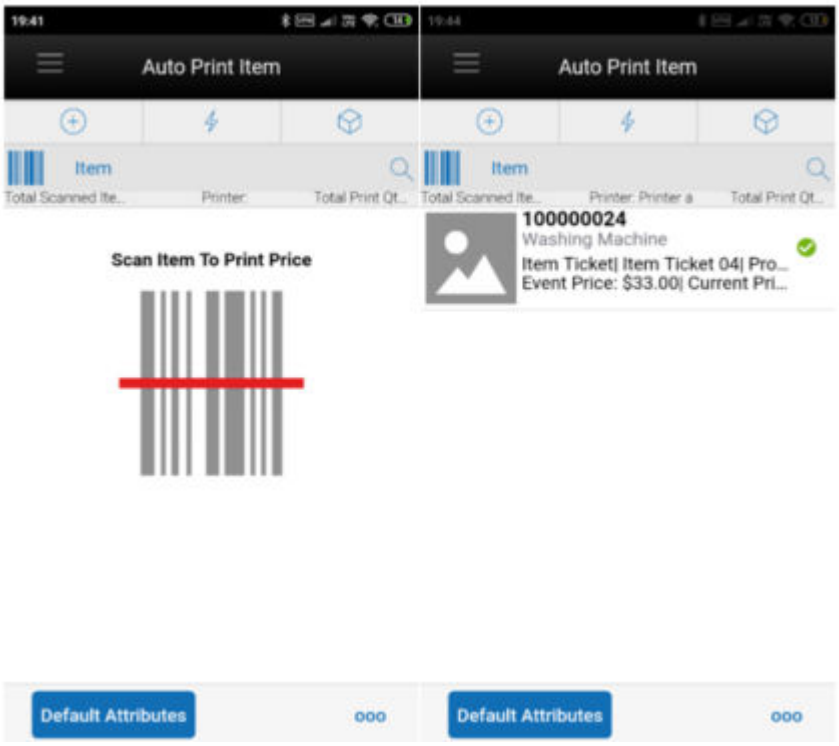
- Ticketing MAF Mobile
- Ticketing JET Mobile

Ticketing MAF Mobile

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Auto Print Item

Figure 14-1 Auto Print Item



This screen is accessed from the Print Item menu under the Inventory Management in the mobile application. Auto Print Item mode is the default mode when the user enters the dialog.

This screen allows the user to scan the items and submit the tickets for printing automatically.

The system by default sets the type to Item Ticket, default format set for the type, Price type based on the **Print Item Events** store parameter and quantity to 1. This helps the user to start scanning the items right from the time entering the screen.

The user can select the **Default Attributes** option to change the attributes. The system starts using the attributes set in this screen from the time the user has changed until the dialog is closed.

Based on the event(s) configured in the **Print Item Events** store parameter or the values set in the default attributes, the system determines what tickets need to be submitted by looking at the item meeting the configured event as described below.

Always Print: This option will always print a ticket regardless if there is a price change.

Clearance: Only print a ticket if on the specific date any clearance event is effective. So, for Clearance say 2, that means today's date + 2 days, if the item on that day has a clearance going on, the system prints the ticket.

Promotion: Only print a ticket if on the specific date any promotion event is effective.

Regular or Clearance: Only print a ticket if on the specific date any Regular or Clearance event is getting effective.

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Regular: Only print a ticket if on the specific date any Regular even of getting effective.

Any Price Event: Based on the date selected, if any price event goes into effect (clearance, promotion or regular price) a ticket is generated. If there is no price event goes into effect, the system prints nothing.

The system needs a printer to be set as default, if no printer is set as default the user is shown an error on the first scan and can select the printer using the 'Select Printer' option from the footer menu.

If there are any overlapping events, the system displays a popup with the events and allows the user to select.

On this screen, the system displays the total scanned items, what is the printer assigned and total print quantity.

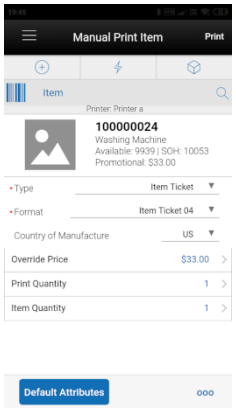
The user can change the mode to Manual Print on the Default Attributes screen.

On each row, the system displays the Item Image if configured, Item Id, Description, print status, type, format assigned, price type, effective date, event price, current price, override price if any, quantity and error if any.

The system generates the ticket after a valid scan and submits to the assigned printer.

Manual Print Item

Figure 14-2 Manual Print Item



This screen appears when the user changes the mode to Manual using the Default Attributes screen.

The system displays the values based on the default setting done for the fields on this screen.

The user can scan or enter the item for which the ticket or label must be printed.

On this screen, the user can edit the type, format, country of manufacture, override price if permission allowed and enter the quantities or can use the default values and print the ticket.

The system displays the country of manufacture of the item scanned and allows to edit.

On the first scan after entering on to the manual mode, the system displays an error if the default printer is not set. The user can change the printer using the **Select Printer** option from the footer menu.

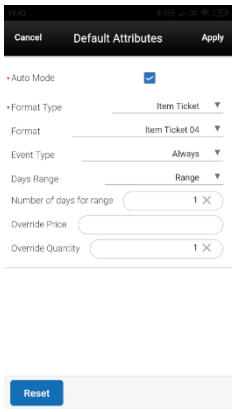
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The user can access the Default Attributes screen anytime to change the mode and set the default attributes.

The system displays the Stock on Hand, Available, Event and price along with the item information above the editable fields.

Default Attributes

Figure 14-3 Default Attributes



This screen is used by the user to set the default attribute values for the ticket generation for the Auto and Manual mode of printing.

This screen is accessed when the user selects the **Default Attributes** button on the Auto Print Item or Manual Print Item screen.

For the Auto Mode, the user can set the format type, format, event type, days range, number of days for range, override price and quantity.

The **Event** type field consists of following options. Always, Promotion, Clearance, Permanent, Clearance or Permanent and Any Price Event. The default value shown here is set from the **Print Item Events** store parameter.

The **Days Range** option includes, Specific Date, Range, Past and Future. For all the options the range cannot be more than 3 days.

Based on the range selected, the system determines whether the scanned item falls in the selected event and if an event exists, the system generates the ticket and submits to print.

For the Manual mode, the user can set the format type, format, override price and the override quantity.

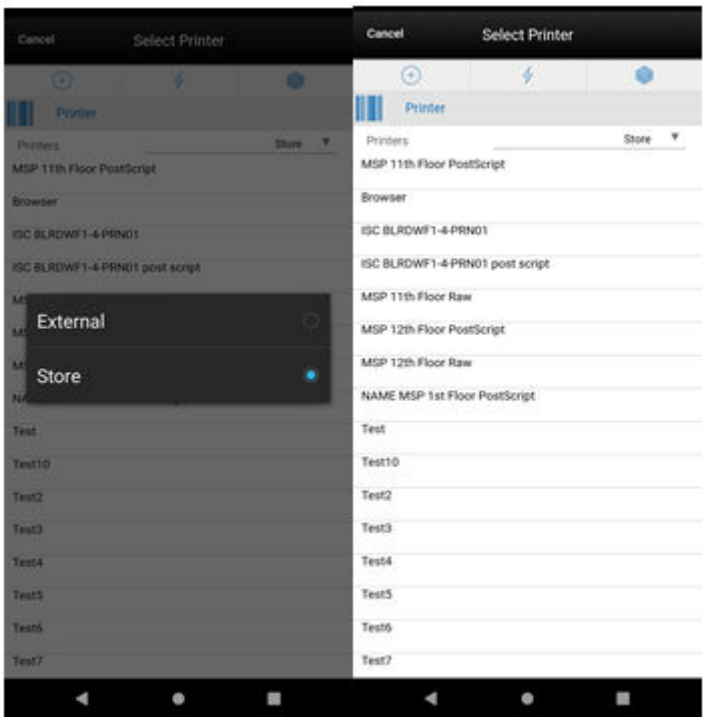
For the both the modes, the system considers the override price and quantity and sets the value when the ticket is generated.

For the manual mode the override price and quantity are populated and allowed to edit on the Manual Print Item screen.

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Select Printer

Figure 14-4 Select Printer



This screen is for the user to set the printer for the ticket printing.

On this screen, the user can filter the printers by External or Store by selecting from Printers dropdown.

The Bluetooth printers are indicated with the Bluetooth symbol and prefix 'BT' and these printers cannot be scanned.

On this screen the user can select or scan the barcode of the printer and submit the tickets for printing.

This screen is accessed from the **Select Printer** option on the Auto Print Item, Manual Print Item screens and Print Tickets popup that appears when printing tickets from the container items screen.

This screen lists all the printers that are available in the system for the item tickets and label type.

The selected printer is displayed on the Auto Print Item and Manual Print Item screens for the user to know to which printer the tickets/labels are submitted for printing.

> **Note**
>
> For specific information on how tickets are sent to the printer see the *SIOCS Implementation Guide*

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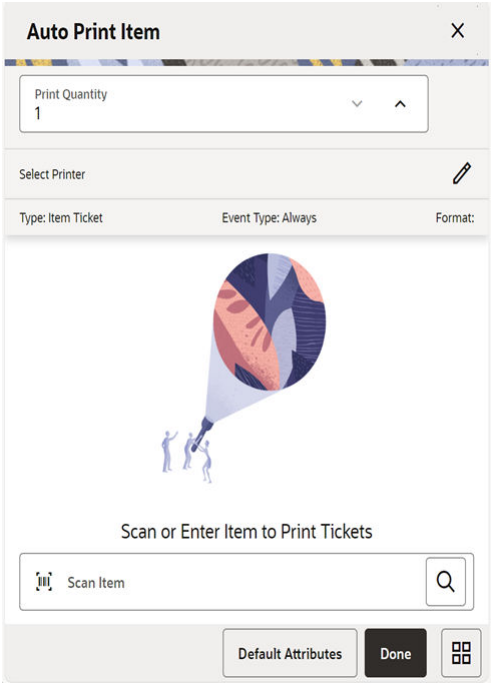
Ticketing JET Mobile

The ticketing dialog in the Jet Mobile allows users to print the item tickets and shelf edge labels. This dialog supports printing tickets either in Auto mode or Manual. In Auto Print you can quickly scan the items and print the tickets and labels without any user intervention by presetting the values whereas in Manual the user can change certain ticket components before printing the ticket.

The basic objective in Auto mode is, you scan an item and system determines whether there are any price events exists for the event type set for the specific date and tickets are generated whereas in Manual mode you scan an item and the system fetches all the price events for the effective on specific date or days range based on the setting and allows you to print tickets for one or more events.

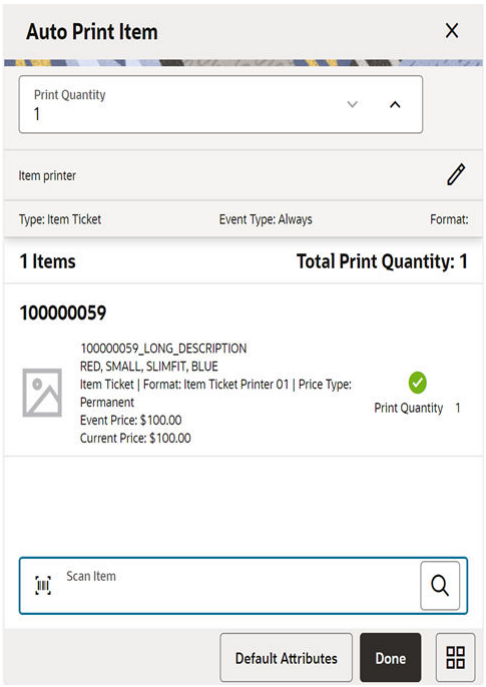
Auto Print Item

Figure 14-5 Auto Print Item



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Figure 14-6 Auto Print Item



The ticketing dialog in the Jet Mobile is accessed from the Print Item menu under the Inventory Management. By default when you enter into this dialog it will be set to Auto Print and you can change the attributes and the mode using the Default Attributes option.

On the Auto Print screen, you can scan the items and the system automatically submits the print request as and when you scan the items. The search option on the scan bar helps you to search the items using the lookup feature.

Default Settings

The system will set the below default values when you enter the screen and will remain until you change the values in the Default Attributes screen. The settings done in the Default Attributes will stay in the memory until the you exit the dialog and when you come back to the ‚Print Item', the system will take the system default values.

Type

When you enter the screen, by default the system will set the type to print the item tickets and you can change it using the default attributes.

Event Type

The system will by default set the event type based on the **Print Item Events** store parameter. You can change the event type to print using the Default Attributes screen.

The system determines what tickets need to be submitted by looking at the item meeting the configured event as described below.

- **Always Print**: This option will always print a ticket regardless if there is a price change.
- **Clearance**: Only print a ticket if on the specific date any clearance event is effective.
- **Promotion**: Only print a ticket if on the specific date any promotion event is effective.

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- **Regular or Clearance**: Only print a ticket if on the specific date any Regular or Clearance event is getting effective.
- **Regular**: Only print a ticket if on the specific date any Regular even of getting effective.
- **Any Price Event**: Based on the date selected, if any price event goes into effect (clearance, promotion or regular price) a ticket is generated. If there is no price event goes into effect, the system prints nothing.

Days Range

Auto print is meant for the specific date, when you enter the screen, the system by default assigns the current date to look for the events. You can change the date using the Default Attributes screen.

Format

Format - The system determines the format for the item based on the following method.

The system determines the default format what is set on the default attributes screen.

If nothing is set on the default attributes screen, the system checks what is the event applied for the scanned item (Promotion, Clearance and Regular) on the ticket and see whether the corresponding format is available in the format assignment and if available, associate that to the ticket.

If the format assignment for the event is not set or if nothing is set in default attributes, the system does not generate the ticket. It displays the error message at the item level and does not print a ticket.

Printer

The system will assign the default printer based on the ticket print format configuration and allows you to change using the pencil icon. If the system could not find the default printer assigned, it will prompt you to select one.

Print Quantity

On this screen the print quantity is set to 1 when you enter the dialog and allows you to change the preset value. You can change the method the preset value is calculated on the Default Attributes screen.

- If it is set to SOH, the system will prepopulate the value with the current SOH of the scanned item.
- In case of Shelf Label and if the user has set Facings, the system fetches the shelf label quantity defined in the sequence table to populate the print quantity field.
- If the setting is custom, the system will prepopulate it with the custom value defined in the Default Attributes screen.
- If it is set to Available, the system will default it to the current Available quantity.
- The system will default to 1 if the Available or SOH is not >0.

The system will allow you to change the print quantity value on the Auto Print Screen only when the setting on the default attributes screen for the print quantity is custom.

On each row, the system displays the Item Image if configured, Item Id, Description, print status, type, format assigned, price type, effective date, event price, current price, override price if any, quantity and error if any.

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The system generates the ticket after a valid scan and submits to the assigned printer. If the system is not able to prin the ticket for an item due to non assignment of format or if no pricing is available, it will display an error at the item level and allows you to scan further items.

Manual Print Item

Figure 14-7 Manual Print Item

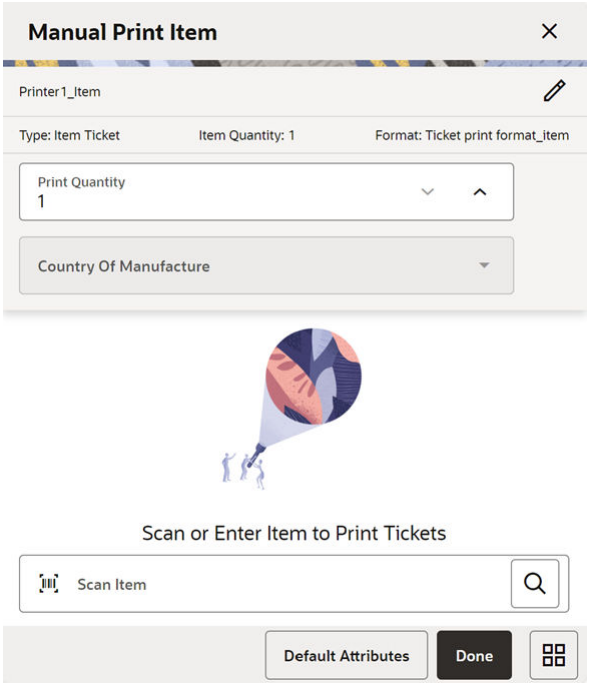
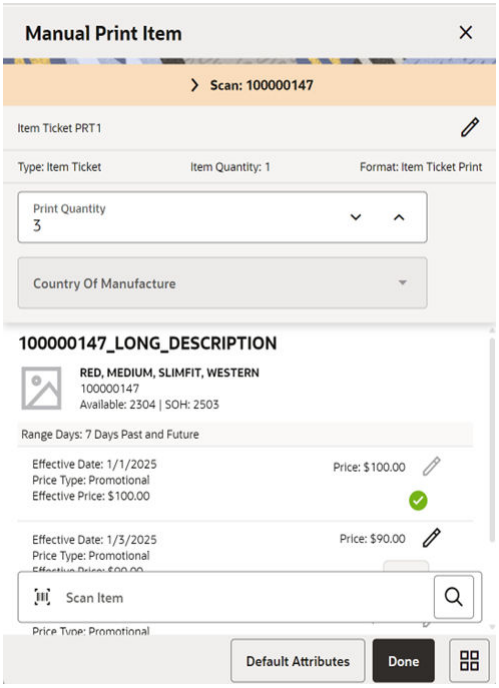


Figure 14-8 Manual Print Item



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Figure 14-9 Manual Print Item

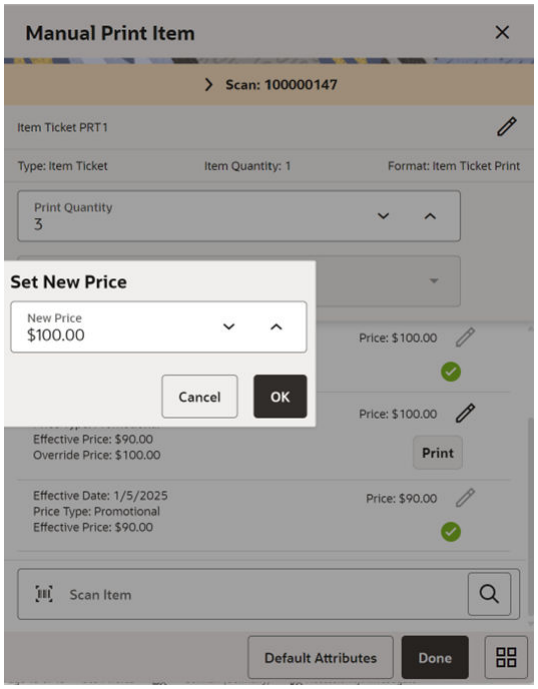
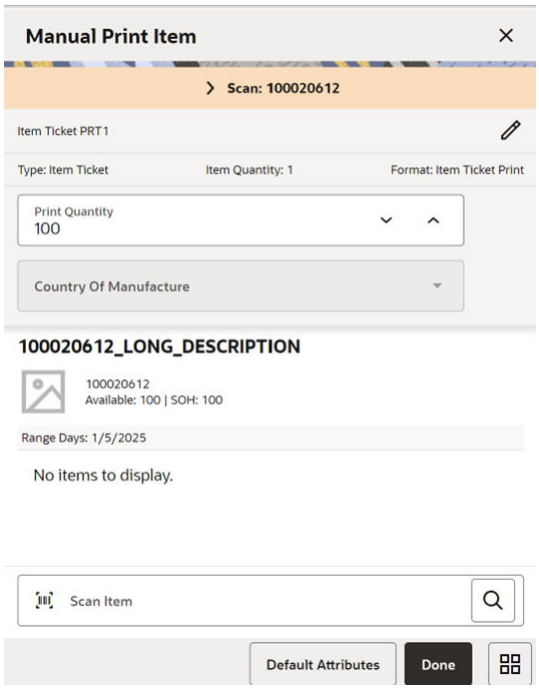


Figure 14-10 Manual Print Item



From the Auto Print Item, you can switch to the Manual Print by changing the mode on the Default Attributes screen.

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On the Manual Print Item screen, after scanning the valid item, you are allowed to modify the print quantity, country of manufacturer, override price and change the printer on the same screen.

The search option on the scan bar helps you to search the items using the lookup feature.

If there are more than one pricing records for the scanned item for the given days range, the system will display all the individual pricing records and allows you to select the print at the every record level.

If there are no pricing records effective on the given date is available, the system will indicate no records to display and allows you to scan a different item.

Default Settings

Printer

The system will assign the default printer based on the ticket print format configuration and allows you to change using the pencil icon. If the system could not find the default printer assigned, it will prompt you to select one.

Print Quantity

The value will be prepopulated based on the 'Default Print Quantity' setting in the Default Attributes screen and allow you to edit.

- If it is set to SOH, the system will prepopulate the value with the current SOH of the scanned item.
- In case of Shelf Label and if the user has set Facings, the system fetches the shelf label quantity defined in the sequence table to populate the print quantity field.
- If the setting is custom, the system will prepopulate it with the custom value defined in the Default Attributes screen.
- If it is set to Available, the system will default it to the current Available quantity.
- The system will default to 1 if the Available or SOH is not >0.

Type

This field indicates what is the ticket type. Based on what is set on default attributes screen. It could be Item Ticket or Shelf Label.

Format

The system determines the default format for the item based on the following logic:

- The system determines the default format what is set on the default attributes screen.
- If nothing is set on the default attributes screen, the system checks what is the event applied for the scanned item (Promotion, Clearance and Regular) on the ticket and see whether the corresponding format is available in the format assignment and if available, associate that to the ticket.
- If system could not find the assignment, it displays an error when you attempt to print.

Country of Manufacture

By default, the system fetches the country of manufacturer associated to the item and allows to edit.

- On selecting, the system shows the list of country of manufacture for the user to select.
- If the system is not able to find the country of manufacture associated to the item, this field is disabled.

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Item Quantity

This field will hold the quantity of the item that is printed on the ticket. This value is fetched if it is set on the default attributes screen. Shown only when value exists.

Range Days

This indicate the range days.

- Specific Date- It shows the specific date selected.
- Range- N Days Past and Future. (N is the number of days for range)
- Past- N Days Past.
- Future- N Days Future

SOH

This shows the Stock on Hand of the scanned item.

Available

The system displays the available quantity of the item.

In addition to the above fields, you can see the below fields at the individual pricing record level.

Price

You can see the effective price on the field and edit(override) using the pencil icon if you have allow override ticket price permission. The overridden price is shown on the override price.

Effective Date

The system fetches the effective date and shows on the list for the user to select the print.

Price Type

The system fetches the price type of the item effective based on the day of the print date.

Values include Permanent, Promotional and Clearance.

After providing the inputs, you can select the print option to print the tickets or labels.

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Default Attributes

Figure 14-11 Default Attributes

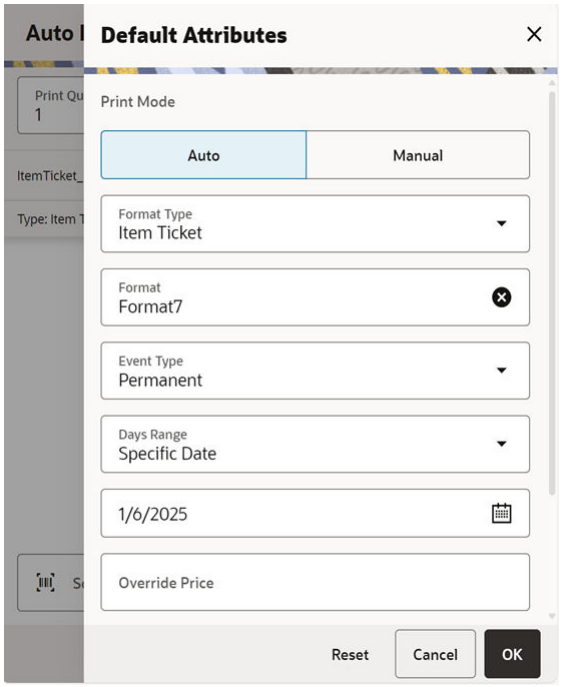
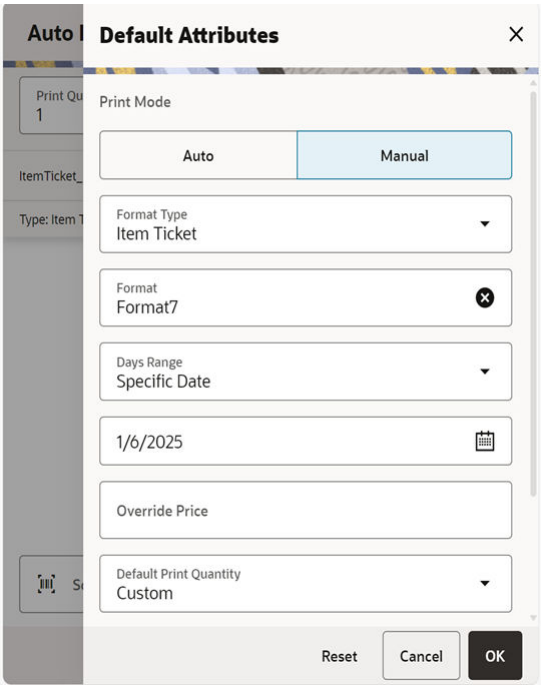


Figure 14-12 Default Attributes



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This screen is for you to switch the mode of printing and set the default attributes. You can access this screen from the Default Attributes button on the Auto Print Item or Manual Print Item screen.

Following are the list of fields for which you can set the default values to apply in Manual and Auto print.

Print Mode

This allows to switch the mode. By default the current mode you are working will be selected.

For example if you are in Auto Print Item and you select the Default Attributes, the mode selected will be Auto, here you can either change the attributes for Auto or switch mode to Manual and set the attributes for manual print and select ok.

Format Type

This allows to to select either Item Ticket or Shelf Label.

Format

This will show the list of formats in the system based on the format type selected.

Default - This will show the default format set on the Ticket Print Format.

Event Type

Displayed only if you select the Auto mode.

Values include Always, Promotion, Clearance, Permanent, Clearance or Permanent, Any Price Event

Default - Picks up from the store parameter 'Item Print Events'.

Days Range

The system allows a maximum of 7 days in range.

Values:

- Specific Date (Date Widget)
- Range (Not available for Auto)
- Past (Not available for Auto)
- Future (Not available for Auto)
- Default-Specific

Number of future days from today

Displayed only when Future is selected from Days range field.

Default = 1. 0 Indicates Today

The system prints the tickets for the events effective today and x days later.

Example: If the user gives 3 on 7/1/20 the system prints the tickets for the price events that are effective on 7/1/20, 7/2/20, 7/3/20 and 7/4/20.

If you change the mode to auto, the system will hide this field.

Number of past days from today

Displayed only when Past is selected from Days range field.

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Default = 1. 0 Indicates Today.

If you change the mode to auto, the system will hide this field.

Number of days for range

Displayed only when Range is selected from Days range field.

Default = 1. 0 indicates Today.

The system prints the tickets for the price events effective that are x days prior, today and x days later.

Example: If the user gives 3 on 7/1/2020 the system prints the tickets for the price event effective on 06/28/20, 06/29/20, 06/30/20, 07/01/20, 07/02/20, 07/03/20 and 07/04/20.

If you change the mode to auto, the system will hide this field.

Override Price

Editable in case the user has permission to override ticket price.

If a value is given here, the system will take this as overridden price and apply this price when generating the ticket.

Default Print Quantity

You can provide the default print quantity for printing the tickets/labels.

Values:

- SOH
  - This option is listed only in case of Item Ticket.
  - If this is selected, the system will default the SOH of the item on the print quantity field on the Auto and Manual print item.
- Available
  - This option is listed only in case of Item Ticket.
  - If this is selected, the system will default the Available SOH of the item on the print quantity field on the Auto and Manual print item.
- Facings
  - This option is listed only in case of Shelf Label and sequencing is turned on Store Parameter (Display Sequence Fields).
  - The shelf label quantity defined in the sequence table is used to populate the print quantity field.
- Custom
  - If this is selected, the system will allow the user to set a custom value and that is prepopulated on the print quantity field on the Auto and Manual print item.

Item Quantity

Default = 1

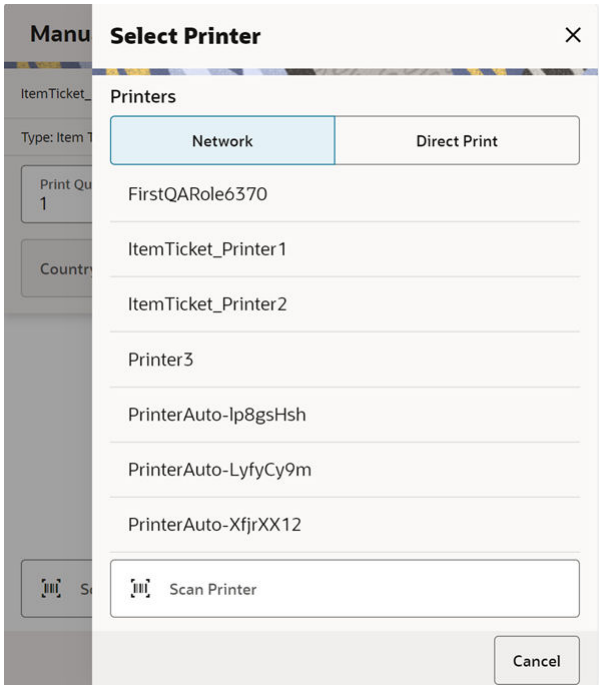
This is displayed for the Manual Mode.

This captures the item quantity that need to be sent to the printer. Note: Item Quantity is different from Print Quantity. This is a place holder to indicate the quantity of the item and that need to be printed on the ticket.

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Select Printer

Figure 14-13 Select Printer



This is screen appears when you select the pencil icon on the printer field to set the printer for ticket printing.

On this screen, you can filter the printers by Network or Direct Print.

Network printers are printers that are configured in the store.

Direct Print printers are printers like Blue Tooth printers that are configured in the device.

On this screen you can select or scan the barcode of the printer and submit the tickets for printing.

This screen is accessed from the Auto Print Item, Manual Print Item screens and Print Tickets popup that appears when printing tickets from the container items screen.

This screen lists all the printers that are available in the system for the item tickets and label type.

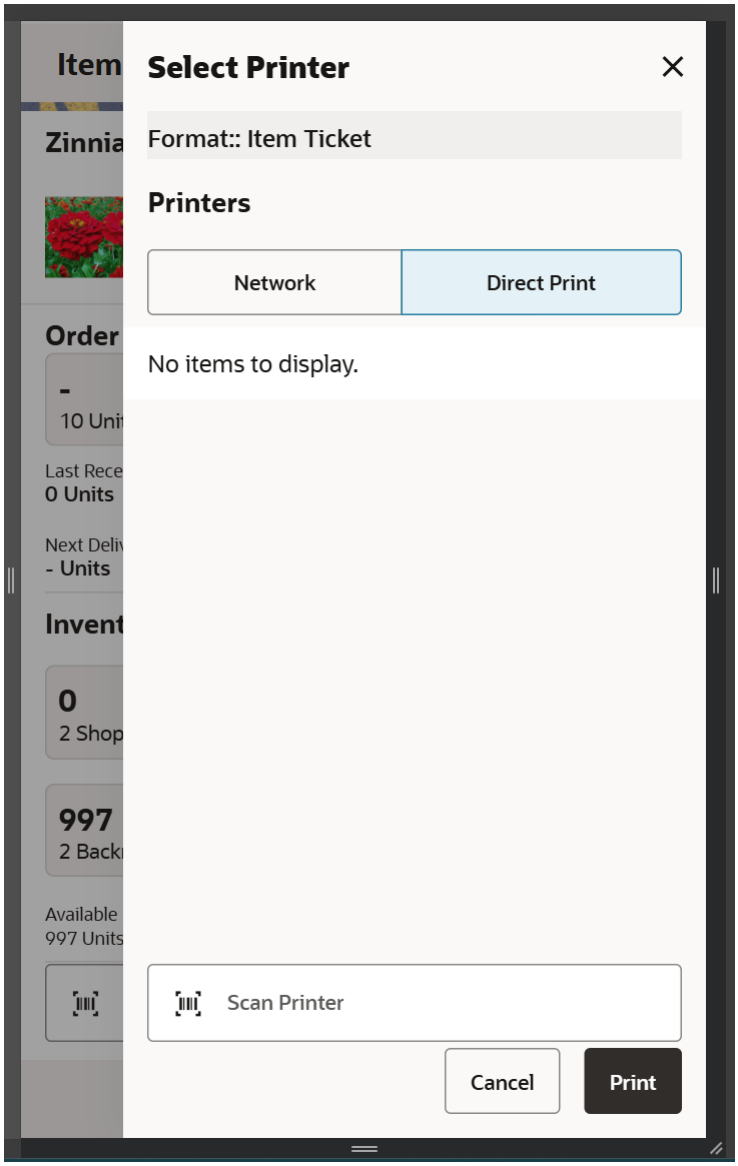
The selected printer is displayed on the Auto Print Item, Manual Print Item screens for you to know to which printer the tickets/labels are submitted for printing.

> **Note**
>
> For specific information on how tickets are sent to the printer see the *Store Inventory Operations Cloud Services Implementation Guide*.

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Quick Print Ticket

Figure 14-14 Select Printer Screen



The Select Printer screen displays a list of printers including Bluetooth printers.

On this screen, you can filter the printers by Network or Direct Print.

Network printers are printers that are configured in the store.

Direct Print printers are printers like Blue Tooth printers that are configured in the device.

On this screen you can select or scan the barcode of the printer and submit the tickets for printing.

This ticket print will always be the item default ticket format.

For Bluetooth printing, the ticket must have a ZPL attached.

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The system will print the tickets for the current event that is effective for the item.

The Print Ticket option will be available in: Item Lookup, Quick Orders and Quick Count.

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15

Store Orders

This chapter is divided into the following sections:

- Store Orders MAF Mobile
- Store Orders JET Mobile
- System Generated
- Quick Orders JET Mobile
- Store Orders Integration

Business Case

- A retailer has milk and eggs that are setup on semi auto replenishment. Purchase Order gets generated in merchandising for the milk and eggs and it comes to SIOCS. Store manager opens the store order for the milk and eggs within the Store Orders dialog. Manager updates the quantities and approves the store order.
- A retailer has a need to order more cornflakes due to the high demand of a current promotion. A retailer creates a store order for more boxes of cornflakes.
- A retailer has certain items that are needed at different times of the day. Within a store order, a timeslot for the delivery can be specified, so it is possible to order doughnuts in the morning, sandwiches at lunch, and hot meals in the evening.
- A retailer realizes that they are often out of dairy items because of very variable customer purchase habits. The store orders what is needed by scheduling a store order product group for the Dairy Department for each Monday. A system generated store order is created on Monday for the dairy items and the retailer walks through the items on the store order and enters in the needed quantity. The store order is approved and fired off to the merchandising system and three days later the items arrive at the store on a warehouse to store transfer or supplier direct delivery.

Store Orders MAF Mobile

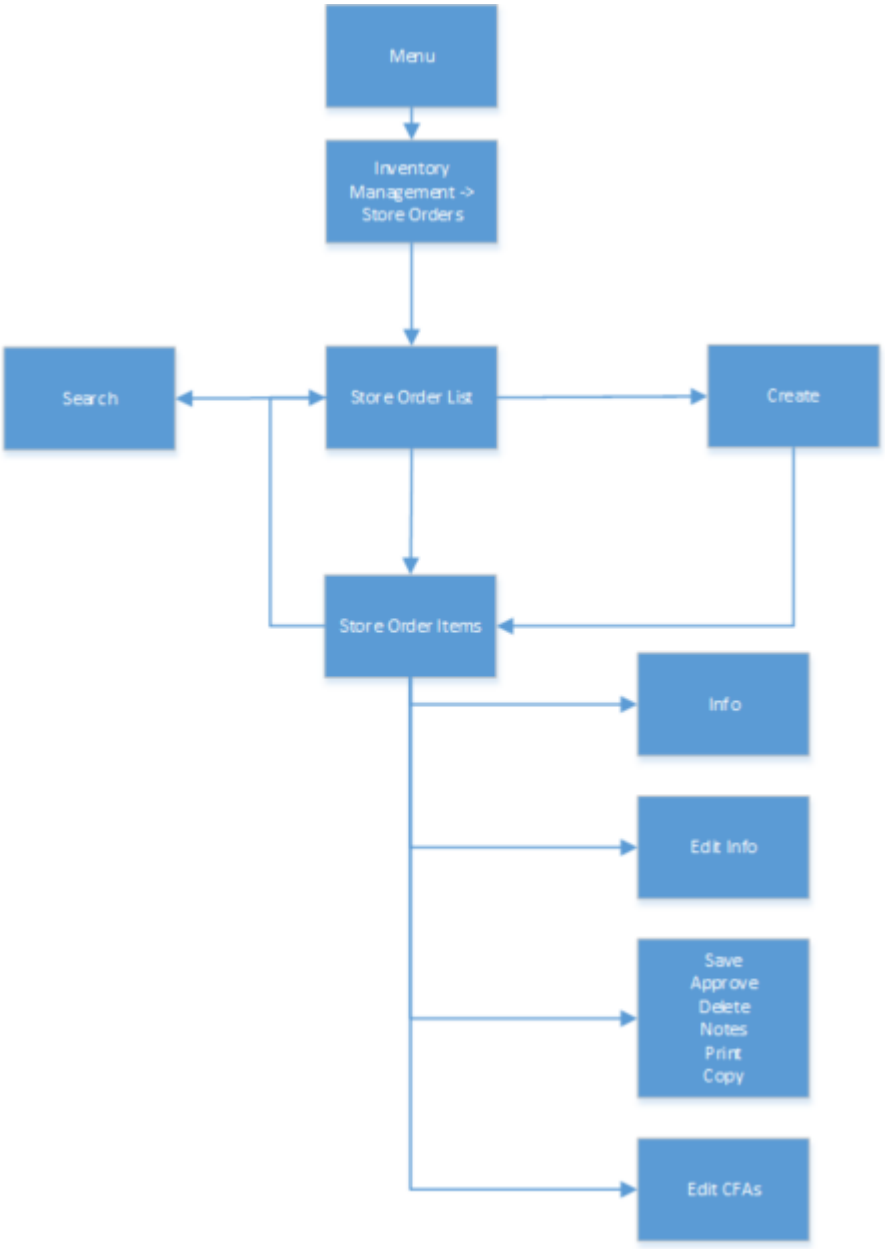
Store Orders allows a store to request items to be ordered to the store. The items being requested may come from a supplier or a warehouse. The system allows a user to capture items and their quantities to be ordered as well as define restrictions for the store order. The inventory is sourced to the store based on the corporate replenishment setup. This can be either a delivery from a warehouse or a drop ship from the supplier. The actual sourcing, delivery timings, and final quantities remain a function of the replenishment system. Store Orders may be created manually on the mobile application. They may also come in from an external system via a web service and the user can enter quantities against the external order quantity. Features:

- Create a new store order
- View or edit and existing store order
- Delete an In Progress store order

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- Copy a Completed store order
- Print Store Order Report

Figure 15-1 Store Orders MAF Mobile Screen Flow

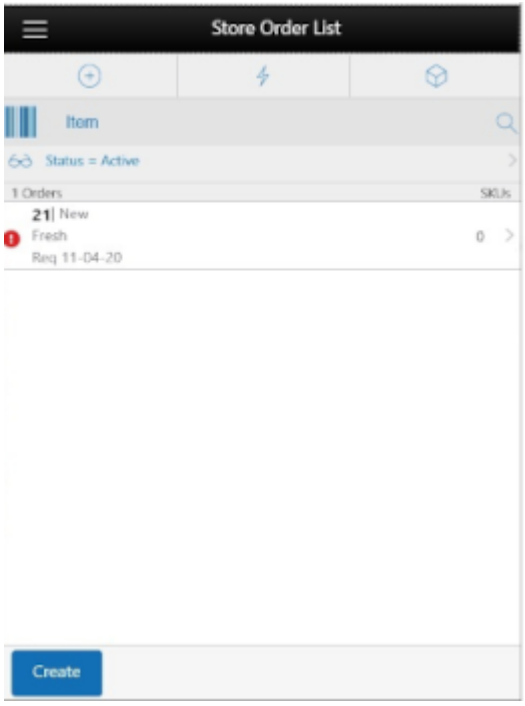


Store Orders are accessed within the Inventory Management menu by selecting **Store Orders**. Selecting the Store Orders menu option takes you to the Store Order List screen. On this screen, you have the option to search for existing store order records. You can create a store order, edit, or view a store order. When creating, editing, or viewing a store order, you are first directed to the list of items on the Store Order Items screen. You can add, view, and edit the details of the items on the Item Detail screen. You can specify values for CFAs (Custom Flexible Attributes) set up for store order via the Edit CFAs screen.

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Store Order List

Figure 15-2 Store Order List



When navigating to Store Orders, the **Store Order List** screen displays the **New** , **In Progress** and **Submitted** store orders as the default list and a red '!' icon will be displayed for those store orders that have a requested date before today.

The Store Order List will contain store orders for the following origins:

- **Manual**: Store order was created manually in the system.
- **External**: The store order was created in an external system such as a merchandising or forecasting system.
- **System**: The store order was generated by the system from a scheduled store order product group

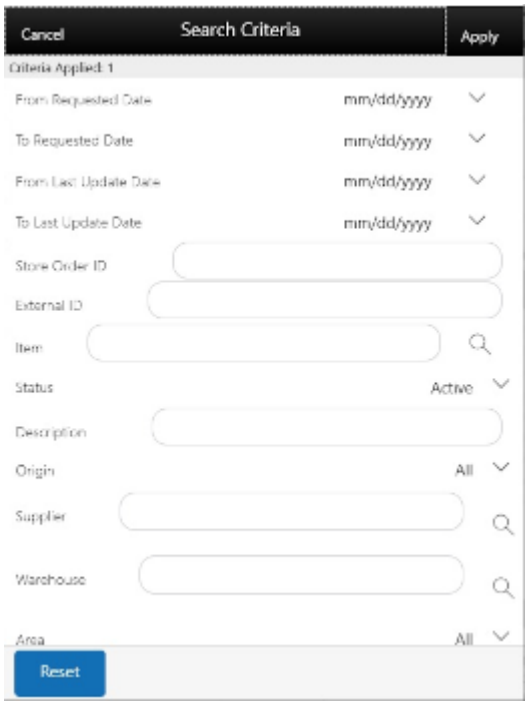
You can use the search criteria eye glasses to navigate to the Search Criteria (Store Orders) screen to enter search criteria for store orders. When scanning/entering an item in the scan bar, the system adds the item to the entered search criteria and narrows down the current list of store orders based upon the scanned/entered item.

Creating a new store order directs you to the Create Store Order popup to build a new store order. Selecting a store order from the list navigates you to the details for that existing store order.

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Search Criteria (Store Orders)

Figure 15-3 Search Criteria Screen (Store Orders)



The **Store Orders Search Criteria** screen is accessed by the eye glasses on the Store Order List screen. After applying the search criteria, the results are listed on the Store Order List screen and the criteria applied is shown.

Search criteria include: From/To Requested Date, From/To Last Update Date, Store Order ID, External ID, Item, Status, Description, Origin, Supplier, Warehouse, Area, Context, and User.

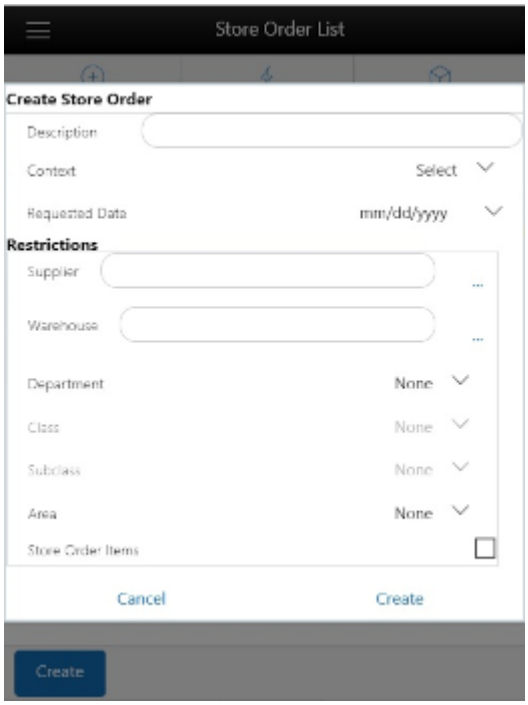
Statuses include: ‘New’, ‘In Progress’, ‘Submitted’, ‘Approved’, ‘Canceled’ and ‘Active’. ‘Active’ status consists of ‘’New’, ‘In Progress’ and ‘Submitted’.

There is a search limit that will be used to return a set number of records, this is defaulted based upon a system admin setting.

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Create Store Order

Figure 15-4 Create Store Order



The **Create Store Order** screen is used when creating a new store order and it is accessed when selecting **Create** from the Store Order List screen. All store orders created on mobile will have an origin of 'manual'. A user must have create permissions to create a new store order.

Every newly created store order will have a system generated unique store order ID. The user may also choose to give the store order a description. The description is an optional text field to describe the store order. An optional context can be assigned to the store order, the context types are populated at setup within the **Code Info** dialog on the desktop. The last field in the header is the **Requested Date**, when the store order is wanted by. **Requested Date** is required and must be greater than or equal to today. The **Requested Date** may have additional date validations later on in the store order process (when adding items or at time of approval) depending on if the item is a 'Store Order' replenishment item.

Restrictions

The last piece of the create process is the restrictions section which is used to define what items the store order is restricted too, in other words what items are allowed to be added to the store order. Restrictions are not required, if not set up, then items will not be restricted. Restrictions can be defined by one or more of the following:

- Supplier
- Warehouse
- Merchandise hierarchy
- Area

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- Store Order replenishment items

More than one restriction can be defined for a store order.

Example: A restriction of Supplier 1212-Soda Supplier and Store Order Items of 'checked' would mean that all added to the store order must be a Store Order item for Supplier 1212-Soda Supplier.

Both Supplier and Warehouse restrictions can be configured at the store to be:

1. Enabled and optional
2. Enabled and required
3. Not displayed if not used

The supplier has one additional store configuration, **DSD Delivery Supplier for Store Order**, to check. If it is set to **No**, no additional validation is needed and the supplier can be added as a restriction. If it is set to **Yes**, when adding the supplier as a restriction, the **DSD Allowed Indicator** on the supplier must be set to **Yes** in order to add the supplier. If the supplier indicator is set to **No** then a store order cannot be created for that supplier.

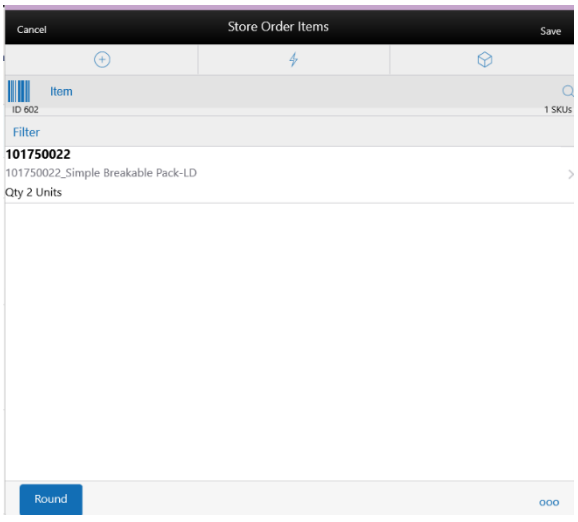
An Area is setup on the desktop in the Area dialog. Areas can be used as restrictions on store orders if the store is configured to **Yes** for **Enable Area for Store Orders**.

Merchandise Hierarchy and Store Order Replenishment Items are always available to be selected for restrictions.

> **Note**
>
> Restrictions will already be set for store orders that are system or externally created.

Store Order Items

Figure 15-5 Store Order Items Screen



Initially, if the user is creating a new store order, this items screen will not have any items. When selecting an existing store order from the Store Order List screen, this screen will be

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displayed with the items for the store order. Line items appear in a list and selecting a line item navigates to the item details of that item.

Fields will include, item, item description and item image depending on the system configuration. The quantity for the item on the store order will display once a quantity has been added for the item. If the store order is from an 'External' origin there will also be an external quantity representing the suggested quantity to be ordered.

Delivery Timeslot: Will be displayed if store is configured for delivery timeslots.

- The Delivery Timeslot at the header level will be used as a default at the item level for the 'SO' (store order) items. Changing the timeslot at the header will only apply to newly added items on the store order.
- If not Delivery Timeslot is selected at the header, the item level will default to 'None'.
- The Delivery Timeslots list will be populated from the Delivery Timeslot Admin screen on the desktop. The list will have those delivery timeslots that the user has data permissions for.

If an item has been changed in the current session, it is indicated by a bar on the left of the item. Scrolling in the list of items displays a filter. The filter can be used to narrow down the list of items. Filtering can occur by item ID and description.

Items can be removed by swiping. Items added by the user will be flagged for removal. Items that were on the store order from an 'External' origin will have their store order quantity set to zero.

The ellipsis in the lower right hand corner accesses the footer menu which contains all of the functions that can be performed on the store order.

Item Validations

- Scanning or entering an item in the scan bar navigates you to the Item Detail screen for that item. The quantity may be updated depending on the scan mode.
- Items scanned will be restricted to those restrictions defined on create.
  - **Supplier**: Restricts the store order to items only for that supplier.
  - **Warehouse**: Restricts the store order to items only for that warehouse.
  - **Merchandise hierarchy**: Restricts the store order to items only for that merchandise hierarchy.
  - **Area**: Restricts the store order to items only defined for that area.
  - **Store Order replenishment items**: When this restriction is checked the system restricts the store order to items that are only store order replenishment items.
- **Store Order Allowed**: There is a store re-orderable indicator that is sent on from merchandising (ItemLocVirt). This must be **Yes** for the item to be put on the store order. If it is set to **No**, the user will get an error and the item cannot be store ordered.
- If the item is an 'SO' (store order) replenishment item, and it has a store order reject indicator set to **Yes** the **Request Date** for the store order must be greater than or the **Next Delivery Date** for that item.
  - If it is not then the item cannot be added to the store order.

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> **Note**
>
> The 'SO' replenishment method, store order reject indicator and the next delivery date are defined in the merchandising system for the item and held in EICS on the item/store record.

- UINS or GS1 databar data (extended attributes) are not captured in Store Orders.

Adding Items - System and External Store Orders

If the store order is a system or external store order, unexpected items (those not originally on the external store order), will only be able to be added if the store order has the Add Items indicator checked to **Yes**. If it is set to **No** the user will only be able to enter/scan items and quantities against the items that are originally on the store order.

Quantity Validations

Rounding – see Rounding menu option below

Tolerances define how much the store order quantity can deviate from the external store order quantity.

Tolerances will be validated for items on externally created store orders. Tolerances come into the system from merchandising and are defined on the item/location. They can be set as a percentage or UOM, one will be sent, not both. Tolerances will be validated if they exist. A tolerance of 0, means that the store order quantity must match the external order quantity exactly, the quantity field will be defaulted to the external order quantity and disabled.Tolerance UOM: The system will take the external order quantity and add the Tolerance UOM to it to get the upper range, and subtract the Tolerance UOM to get the lower range. Only for SUOM, not applicable to cases.

Example:

External Order qty = 100 units. Tolerance UOM = 10. Entered User Quantity must be 90-110

For Tolerance %: The system will take the % value x the External Order Quantity to get the tolerance quantity. That tolerance quantity will be added to the external order quantity for the upper range and subtracted from the external order qty to get the lower range.

Example:

External Order qty = 100 units. Tolerance % = 7. Tolerance Qty = 7% x 100 = 7 units Entered User Quantity must be 93-107 units

Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Store Order Items screen. The menu functions include the following:

Info: Accesses the Info popup.

Notes: Accesses the notes dialog to capture notes.

Refresh Cost: If the user has permission for cost to display in the store order, this button will go out and grab the latest costs for the items to be used in the Total Estimated Cost on the Store Order Info screen.

Default Qty: The Default Qty will update the store order quantities for all line items on the store order that do not have a quantity.

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- For manually created store orders the quantity will be set to the last requested quantity from the most recent approved store order.
- For externally created store orders the quantity will be set to the external quantity.

Edit Store Order: takes the user to the Edit Store Order screen to edit header level store order information.

Edit CFAs: Lets the user enter values for the CFAs that are set up for store orders.

Approve: Approves and completes the store order. The store order is set to ‘Completed’ status..

- User must have Approve Store Order permission.
- If the user has the Submit Store Orders permission set to ‘yes’, the store order will require a submit first, thus the Approve button will not be available until the store order is in ‘submitted’ status. (assuming user also has Approve store order permission).
- If the user has the Submit Store Orders permission set to 'no', the Approve button will be available in 'In Progress' status as well as 'Submitted' status (assuming user also has Approve store order permission).
- If the store order has the Case Pack Round indicator set then the store order will require rounding. See Round option below.
- Tolerances on the store order quantity will be validated.
- The store order is published out.

Save: Saves the store order 'In Progress' status to be completed later.

- Saving a store order does not publish anything out; it simply saves it. The **Save** button can be used to implement a Save and Approval process.

Round: will round the item quantities on the store order up to the next multiple of the supplier case size. Example: Pack Size is 12. User enters in a quantity of 20. Round will round up to 24 .

- Available for store orders that are editable.
- System, External and manually created store orders
- Externally created store orders from RMFCS that are for a supplier (Purchase Order) will have the Case Pack Round indicator set to ‘Yes’, thus requiring the user to round the store order.

Cancel Submit: It will set the store order back to ‘In Progress’ status.

- Will be available for store orders in ‘Submitted’ status.
- User must have Cancel Submit Store Orders permission to have this option.

Submit: will set the store order to ‘Submitted’ status which is still an editable state. Submit will perform all functionality of the approve option with the exception of integration will not take place.

- Available for ‘New’ and ‘In Progress’ store orders.
- User must have Submit Store Orders permission for the option to be available.

Delete: Marks the store order to 'Canceled' status.

Cancel: Exits the store order; changes made in that session are not saved.

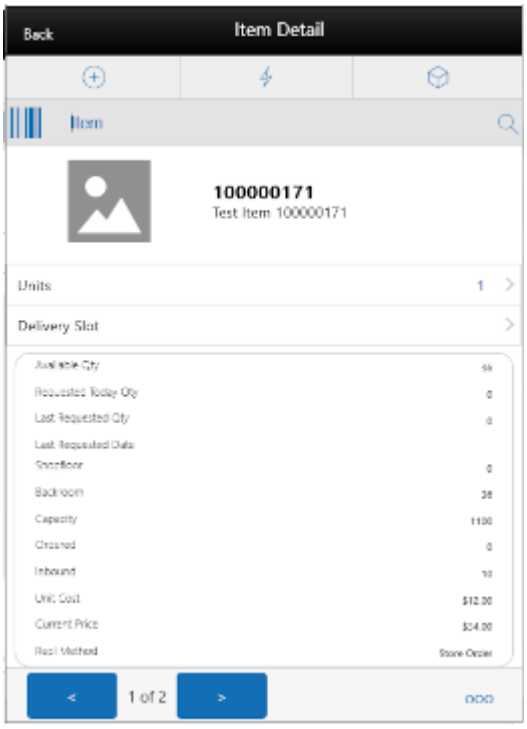
Print: Displays the common print dialog to print the store order report.

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Copy: The copy function is only available for those store orders in a completed state which is 'Approved' or 'Canceled' status. It takes the current store order, copies the items and quantities (not external quantities), and creates a new editable store order with a new ID. It references the copied store order's ID.

Item Detail

Figure 15-6 Item Detail Screen



The **Item Detail** screen is used for selecting or scanning an item from the Store Order Items screen. Scanning or entering an item on this screen in the scan bar, updates the quantity per the scan mode and refreshes the Item Detail screen for the item and quantity scanned. The item rules and validations will be the same as that on the Store Order Items screen.

The item information including the image (which is system configured) displays in the header. The bottom portion of the screen contains various read only fields about the item to assist in creating the store order.

The quantity can be edited and updated manually if permissions allow. For system generated store orders the quantity for all items will be initially blank until the user enters or scans in a quantity for the items.

Additional fields include:

Delivery Timeslot: Will be displayed if store is configured for delivery timeslots.

- If a Delivery Timeslot was selected at the header level of the store order, it will be used as a default at the item level. User will be able to change the timeslot. Changing the timeslot at the header will only apply to newly added items on the store order.
- The Delivery Timeslots list will be populated from the Delivery Timeslot Admin screen on the desktop.

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- The list will have those delivery timeslots that the user has data permissions for.
- Delivery Timeslot is only available for those items that are 'SO' (store order) items.
- Delivery Timeslot is not required.
- When the store order is approved and published out, the Delivery Timeslot will only be sent on the message if the publish indicator is **Yes**.

External Order Qty: If the order was from an external origin. This is the quantity that is suggested to order by the external system.

Available: Available stock on hand for the item at the user's store.

Requested Today Qty: Sum of all requested quantities on all 'Approved' store orders for today's date for the item at the user's store.

Last Requested Qty: The store order quantity for the last/most recent 'Approved' store order for the item at the user's store.

Last Requested Date: The approved date for the store order that has the last requested quantity.

Next Delivery Date: The next delivery date for the item at the user's store.

- This field is populated on the item location record from the merchandising system and only for 'SO' (store order) replenishment type items.

Shopfloor: Shopfloor inventory for the item at the user's store. Only displayed if store is configured to display shopfloor/backroom.

Backroom: Backroom inventory for the item at the user's store. Only displayed if store is configured to display shopfloor/backroom.

Capacity: The total summed up capacity for the item. Only displayed if store is configured to display sequence fields.

> **Note**
>
> Capacity is setup / defined via a third party upload.

Ordered: The total remaining ordered quantity for the item at the store. This is for transfers, allocations and purchase orders.

Inbound: The total quantity approved to be sent to the user's store. This is for store to store transfers, warehouse and finisher deliveries and RTV shipments.

Unit Cost: The unit cost for the item. Only displayed if user has proper permission.

> **Note**
>
> Unit cost will not be displayed if the currency of the store is different than that of the supplier (in the case that a supplier restriction is set up).

Price: Current price for the item.

Replenishment Method: The replenishment method for the item at the user's store, such as Store Order, Min Max, and so on.

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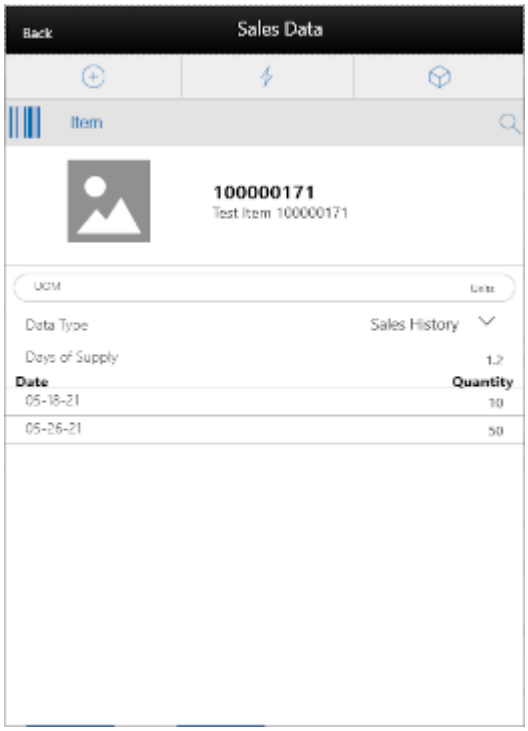
Last Scan: Displays the details that are from the barcode.

- GS1 - will display the barcode, GTIN, and the contents of the barcode such as price, UIN, and so on.
- Type 2 - will display the barcode and the price.
- All other barcodes - will display the barcode.

The footer menu, ellipsis button, contains a reset function as well as remove and restore functions. The Sales Data screen can also be accessed from this menu.

You can page through existing items on the store order using the arrows on the bottom.

Figure 15-7 Sales Data Screen



The **Sales Data** screen is used to display sales data for an item and store. It is accessed by selecting Sales Data from within the footer menu of the (Store Order) Item Detail screen. The screen allows a user to view two types of sales data: Sales History and Sales Forecast. A user must have permission to view Sales History as well as to view Sales Forecast. It the user does not have either permission, this screen will not be available.

Sales History: Will display the past 30 days (or less if 30 does not exist) of Sales History for the item at the user's store. Sales History is pulled from sales within the system that are found in Transaction History. This will display in a list with item and quantity.

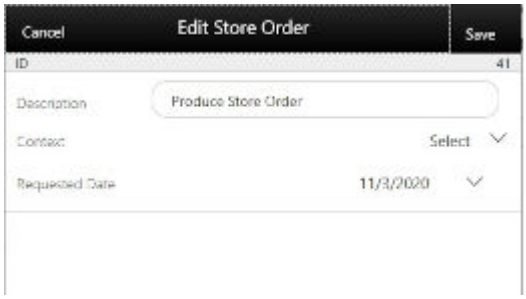
Sales Forecast: Will display the next 30 days (or less if 30 does not exist) of future sales for the item at the user's store. Sales Forecast is retrieved via a web service from an external system such as merchandising. This will display in a list with item and quantity.

Lastly, the system will display the calculated Days of Supply.

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Edit Store Order

Figure 15-8 Edit Store Order Screen

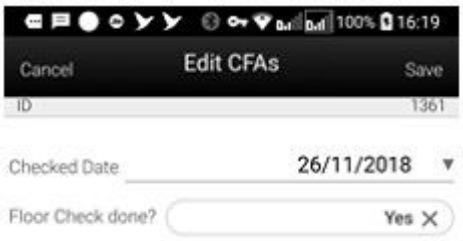


The **Edit Store Order** screen is used to edit header level information about the store order. **Edit Store Order** is accessed by selecting **Edit Store Order** from within the footer menu of Store Order Items, and a user must have proper permissions. The fields are the same as those on the Create Store Order screen and include: description, context, and request date.

Request Date: If there are no 'SO' (store order) items on the store order, the request date needs to be greater than or equal to today. If there are 'SO' (store order) items that have a **Store Order Reject** indictor of **Yes**, the request date needs to be greater than the latest **Next Delivery Date** of the 'SO' items on the store order. This gets validated also upon approval of the store order.

Edit CFAs

Figure 15-9 Edit CFAs Screen



The **Edit CFAs** screen displays the list of CFAs (flexible attributes) that have been set up for Store Orders on the desktop, and lets you enter values for them. The CFAs that are set up as **Required** must have a value entered for it before approving the store order. The value can be one of the following: Date, Text, Decimal, Long depending on the 'data type' set up for the CFAs, while creating them on the desktop. Appropriate security permission is needed for entering CFA values.

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Info Screen

Figure 15-10 Info Screen



The **Info** screen is an informational popup that contains read-only information about the header level of the store order. Fields include:

ID: System generated ID for the store order.

External ID: The ID from the external system for externally created store orders.

Reference ID: ID associated to the store order that was copied.

Description: Description of the store order. For system generated store orders, this will be the description defined on the Product Group.

Status: Status of the store order: New, In Progress, Submitted, Approved, and Canceled.

Context: The context type associated to the store order.

Origin: Where the store order originated: manual, system, or external.

Requested Date: The requested date for the store order.

Total Quantity: Total quantity of all items on the store order.

Total Estimated Cost: Total cost of all items on the store order. This field is only displayed if user has proper permission.

Add Items: Has a value of Yes or No and defines if items can be added to the store order. For manually created store orders this is defaulted to **Yes**. For store orders that are from an external system, or system generated, this may be set to **Yes** or **No**. **Yes** would mean that items can be added to the external store order, whereas **No** would be that items cannot be added and only the items originally on the store order can be ordered.

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Product Group ID: For system generated store orders this will display the Product Group ID that the store order was generated from.

Product Group Description: For system generated store orders this will display the Product Group Description that the store order was generated from.

CFAs: Each CFA attribute and value for the store order.

Restrictions: The restrictions that were defined for the store order.

- Supplier, warehouse, merchandise hierarchy, area, and store order items.

Create Date

Create User

Last Update Date

Last Update User

Approved Date

Approved User

Auto Approved Date: If the store order was auto approved this field will be displayed.

Store Orders JET Mobile

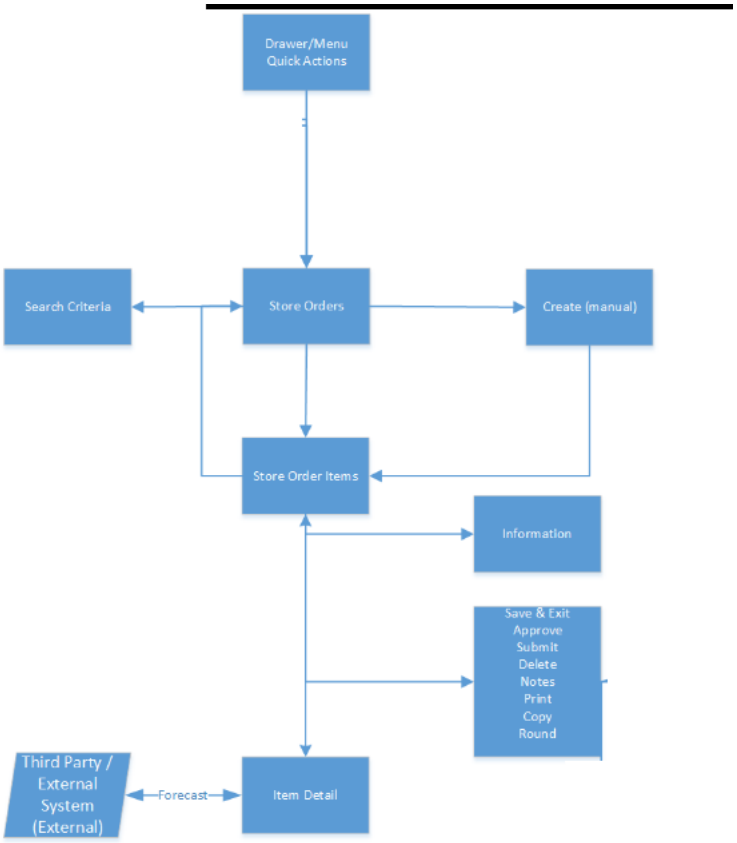
Store Orders allows a store to request items to be ordered to the store. The user can also review, modify and approve orders created by an external ordering system. The items being requested may come from a supplier or a warehouse. The system allows a user to capture items and their quantities to be ordered as well as define restrictions for the store order. The inventory is sourced to the store based on the corporate replenishment setup. This can be either a delivery from a warehouse or a drop ship from the supplier. The actual sourcing, delivery timings, and final quantities remain a function of the replenishment system. Store Orders may be created manually on the mobile application. They may also come in from an external system and the user can enter quantities against the external order quantity.

Features:

- Create a new store order
- View or edit an existing store order
- Delete an In Progress store order
- Submit and Approve a store order
- Copy a Completed store order
- Print Store Order Report

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Figure 15-11 Store Orders JET Mobile Screen Flow

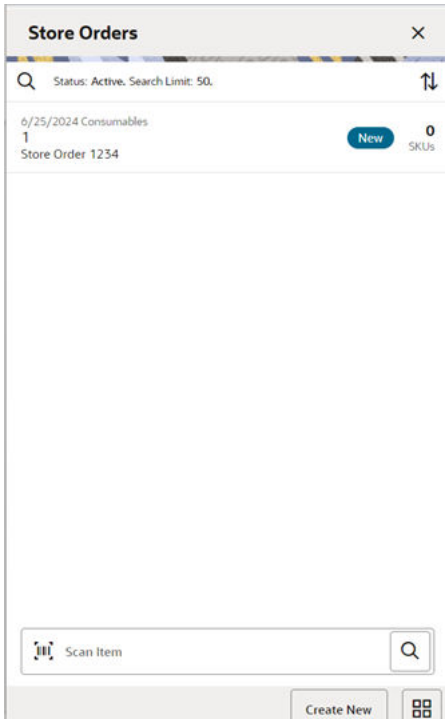


Store Orders are accessed within the Inventory Management menu in the drawer or by selecting Store Orders from Quick Actions. Selecting the Store Orders menu option takes you to the Store Orders screen. On this screen, you have the option to search for existing store order records. You can create a store order, edit, or view a store order. When creating, editing, or viewing a store order, you are first directed to the list of items on the Store Order Items screen. You can add, view, and edit the details of the items on the Item Detail screen. You can specify values for CFAs (Custom Flexible Attributes) set up for store order via the Information screen.

Store Orders

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Figure 15-12 Store Orders



When navigating to Store Orders, the Store Orders (list) screen by default displays the Active status store orders, which include the statuses: New, In Progress and Submitted store orders. There is an orange triangle '!' icon displayed for those store orders that have a requested date before today.

The Store Orders screen will contain store orders for the following origins:

- **Manual**: Store order was created manually in the system.
- **External**: The store order was created in an external system such as a merchandising or forecasting system.
- **System**: The store order was generated by the system from a scheduled store order product group.

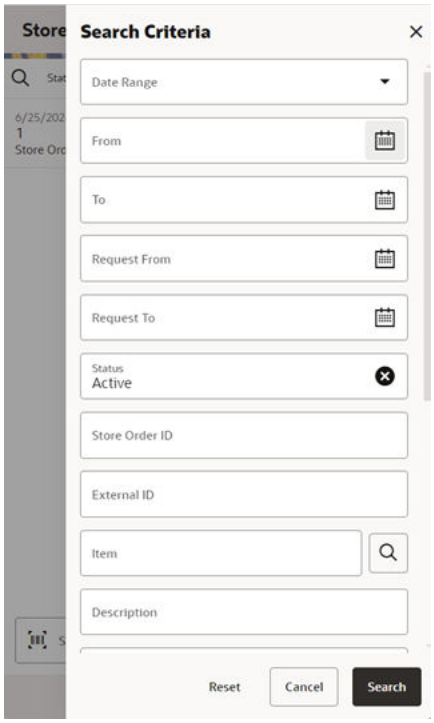
You can use the search / magnifying glass to navigate to the Search Criteria (Store Orders) screen to enter search criteria for store orders. When scanning/entering an item in the scan bar, the system adds the item to the entered search criteria and narrows down the current list of store orders based upon the scanned/entered item.

Creating a new store order directs you to the Create Store Order popup to build a new store order. Selecting a store order from the list navigates you to the details for that existing store order (Store Order Items).

Search Criteria (Store Orders)

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Figure 15-13 Search Criteria Screen (Store Orders)



The Store Orders Search Criteria screen is accessed by the magnifying glass on the Store Orders (list) screen. After the search criteria are applied, the results are listed on the Store Orders screen and the criteria applied is shown.

Search criteria include: Date Range, From/To (Last Update Date), Requested From/Requested To, Status, Store Order ID, External ID, Item, Description, Origin, Supplier, Warehouse, Area, Context, and User .

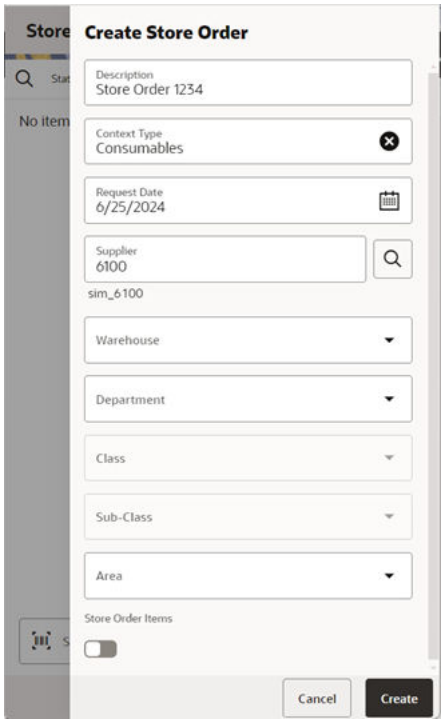
Statuses include: ‘New’, ‘In Progress’, ‘Submitted’, ‘Approved’, ‘Canceled’ and ‘Active’. ‘Active’ status consists of ‘’New’, ‘In Progress’ and ‘Submitted’.

There is a search limit that will be used to return a set number of records, this is defaulted based upon, ‘Search Limit Default for Store Orders’, system admin setting.

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Create Store Order

Figure 15-14 Create Store Order



The **Create Store Order** screen is used when creating a new store order. It is accessed when selecting Create from the Store Orders (list) screen. All store orders created on mobile will have an origin of 'manual'. A user must have, ‘Create Store Orders’ permissions to create a new store order.

Every newly created store order will have a system generated unique store order ID. The user may also choose to give the store order a description. The description is an optional text field to describe the store order. An optional context can be assigned to the store order. The context types are populated at setup within the **Code Info** dialog on the desktop. The last field in the header is the **Requested Date**, when the store order is wanted. **Requested Date** is required for internally created store orders and must be greater than or equal to today. The **Requested Date** may have additional date validations later on in the store order process (when adding items or at time of approval) depending on whether the item is a 'Store Order' replenishment item.

Restrictions

The last piece of the create process is the restrictions section, which is used to define what items the store order is restricted too, in other words what items are allowed to be added to the store order. Restrictions are not required and can be hidden from use. If no restrictions are set, then no items will be restricted. Restrictions can be defined by one or more of the following:

- Supplier
- Warehouse
- Merchandise hierarchy

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- Area
- Store Order replenishment items

More than one restriction can be defined for a store order.

Example:

A restriction of Supplier 1212-Soda Supplier and Store Order Items of 'checked' would mean that all added to the store order must be a Store Order item for Supplier 1212-Soda Supplier.

Both Supplier and Warehouse restrictions can be configured via store options to be:

- Enabled and optional
- Enabled and required
- Not displayed if not used

The Supplier has one additional store configuration, **DSD Delivery Supplier for Store Order**, to check.

- If it is set to **No**, no additional validation is needed and the supplier can be added as a restriction.
- If it is set to **Yes**, when adding the supplier as a restriction, the **DSD Allowed Indicator** on the supplier must be set to **Yes** in order to add the supplier. If the supplier indicator is set to **No**, then a store order cannot be created for that supplier.

In case of warehouse, only the list of warehouses that are allowed for receiving (not excluded from receiving) can be used for creating the store order.

An Area is setup on the desktop in the Area dialog. Areas can be used as restrictions on store orders if the store is configured to **Yes** for **Enable Area for Store Orders**.

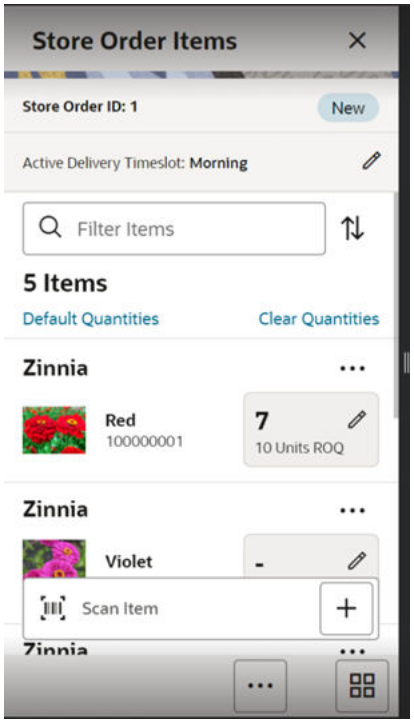
Merchandise Hierarchy and Store Order Replenishment Items are always available to be selected for restrictions.

> **Note**
>
> Restrictions will already be set for store orders that are system or externally created.

Store Order Items

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Figure 15-15 Store Order Items Screen



Initially, if the user is creating a new store order, the Store Order Items screen will not have any items. When selecting an existing store order from the Store Orders (list) screen, the Store Order Items screen will display the items for the store order. Line items appear in a list, and selecting a line item navigates to the Item Details of that item.

Fields include: item, item description and item image, depending on the user preference. The quantity for the item on the store order will display once a quantity has been added for the item. If the store order is from an 'External' origin there will also be a ‘ROQ’, (recommended order quantity) representing the suggested quantity to be ordered.

The filter can be used to narrow down the list of items. Filtering can occur by item ID, description, delivery timeslot, and UOM.

Items can be removed by selecting Delete from the item overflow menu, item level ellipsis. Items that were on the store order from an 'External' origin will have their store order quantity set to zero.

The ellipsis in the lower right hand corner accesses the footer menu which contains all of the functions that can be performed on the store order.

Delivery Timeslot

The Delivery Timeslot will be displayed if the store is configured for delivery timeslots.

- The Delivery Timeslot at the header level will be used as a default at the item level for the 'SO' (store order) items. Changing the timeslot at the header will only apply to newly added items on the store order.
- If no Delivery Timeslot is selected at the header, the item level will not have a timeslot defaulted.

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- The Delivery Timeslots list will be populated from the Delivery Timeslot Admin screen on the desktop. The header selection list will have those delivery timeslots for which the user has data permissions.

Default Quantities: The Default Quantities will update the store order quantities for all line items on the store order that do not have a quantity.

- For a manual and system created store orders, the quantity will default to the Last Requested Qty.
- For externally generated store orders, the quantity will default to the external store order qty.

Clear Quantities: will set all quantities to blank.

Item Validations

- Selecting a line item navigates to the item details of that item.
- Scanning or entering an item in the scan bar will navigate the user per the User Preference, Scan Navigate. The user will either go to the Item Detail for the item or stay on the Store Order Items screen. The quantity may be updated depending on the scan mode.
- Items scanned will be restricted to those restrictions defined on create.
  - **Supplier**: Restricts the store order to items only for that supplier.
  - **Warehouse**: Restricts the store order to items only for that warehouse.
  - **Merchandise Hierarchy**: Restricts the store order to items only for that merchandise hierarchy.
  - **Area**: Restricts the store order to items only defined for that area.
  - **Store Order replenishment items**: When this restriction is checked, the system restricts the store order to items that are only store order replenishment items.
- **Store Order Allowed**: There is a store re-orderable indicator that is sent from merchandising (ItemLocVirt). This must be **Yes** for the item to be put on the store order. If it is set to **No**, the user will get an error and the item cannot be store ordered.
- If the item is an 'SO' (store order) replenishment item, and it has a store order reject indicator set to **Yes**, the **Request Date** for the store order must be greater than or the **Next Delivery Date** for that item.
  - If it is not then the item cannot be added to the store order.

> **Note**
>
> The 'SO' replenishment method, store order reject indicator and the next delivery date are defined in the merchandising system for the item and held in EICS on the item/ store record.

- UINS or GS1 databar data (extended attributes) are not captured in Store Orders.

Adding Items - System and External Store Orders

If the store order is a system or external store order, unexpected items (those not originally on the external store order) can only be added if the store order has the Add Items indicator checked to **Yes**. If it is set to **No**, the user will only be able to enter/scan items and quantities against the items that are originally on the store order.

Quantity Validations

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Rounding – see Rounding menu option below.

Tolerances — Define how much the store order quantity can deviate from the external store order quantity.

- Tolerances will be validated for items on externally created store orders
- Tolerances come into the system from merchandising and are defined on the item/location.
- They can be set as a percentage or UOM, one or the other be sent, not both.
- Tolerances will be validated if they exist.
- A tolerance of 0 means that the store order quantity must match the external order quantity exactly, the quantity field will be defaulted to the external order quantity and disabled.
- **Tolerance UOM**: The system will take the external order quantity and add the Tolerance UOM to it to get the upper range and subtract the Tolerance UOM to get the lower range. This only applies for SUOM, it is not applicable to cases.

Tolerance Example 1:

External Order qty = 100 units. Tolerance UOM = 10. Entered User Quantity must be 90-110

For Tolerance %: The system will take the % value x the External Order Quantity to get the tolerance quantity. That tolerance quantity will be added to the external order quantity for the upper range and subtracted from the external order qty to get the lower range.

Tolerance Example 2

External Order qty = 100 units. Tolerance % = 7. Tolerance Qty = 7% x 100 = 7 units Entered User Quantity must be 93-107 units

Approve: Approves and completes the store order. The store order is set to ‘Completed’ status.

- User must have Approve Store Order permission.
- If the user has the Submit Store Orders permission set to ‘yes’, the store order will require a submit first, thus the Approve button will not be available until the store order is in ‘submitted’ status. (This assumes the user also has Approve store order permission).
- If the user has the Submit Store Orders permission set to 'no', the Approve button will be available in 'In Progress' status as well as 'Submitted' status (This assumes the user also has Approve store order permission).
- If the store order has the Case Pack Round indicator set, then the store order will require rounding. See Round option below.
- Tolerances on the store order quantity will be validated.
- The store order is published out.

Footer Menu

The footer menu is accessed from the ellipsis footer menu on the Store Order Items screen. The menu functions include the following:

- **Notes**: Accesses the notes dialog to capture notes.
- **Print**: Displays the common print dialog to print the store order report
- **Info**: Accesses the Information popup.
- **Cancel**: Exits the store order; changes made in that session are not saved.
- **Delete**: Marks the store order to 'Canceled' status.

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Copy: The copy function is only available for those store orders in a completed state which are in 'Approved' or 'Canceled' status. It takes the current store order, copies the items and quantities (not external quantities), and creates a new editable store order with a new ID. It references the copied store order's ID.

Refresh Cost: If the user has permission for cost to display in the store order, this button will refresh with the latest costs for the items to be used in the Total Estimated Cost on the Store Order Info screen.

> **Note**
>
> This cost is only estimated, and for viewing and general information. It is not communicated to external systems, and will not impact the final cost of the order. This is determined by the corporate ordering system where more specific criteria can be applied like location level cost or deals.

Round: will round the item quantities on the store order up to the next multiple of the supplier case size. Example: Pack Size is 12. User enters in a quantity of 20. Round will round up to 24 .

- Available for store orders that are editable. Available for store orders that are editable.
- System, External and manually created store orders
- Externally created store orders from RMFCS that are for a supplier (Purchase Order) will have the Case Pack Round indicator set to ‘Yes’, thus requiring the user to round the store order.

Cancel Submit: will set the store order back to ‘In Progress’ status.

- Available for store orders in ‘Submitted’ status.
- User must have ‘Cancel Submit Store Orders’ permission to have this option.

Submit: will set the store order to ‘Submitted’ status which is still an editable state. Submit will perform all functionality of the Approve option, except that integration will not take place.

- Available for ‘New’ and ‘In Progress’ store orders.
- User must have ‘Submit Store Orders’ permission for the option to be available.

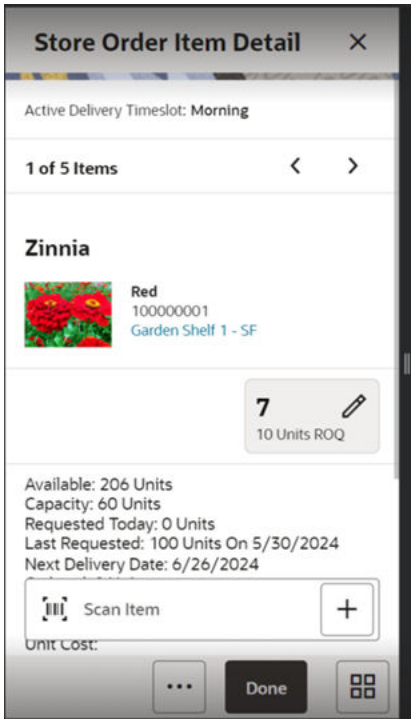
Save and Exit: Saves the store order in 'In Progress' status to be completed later and returns user to their previous location.

- Saving a store order does not publish anything; it simply saves it. The **Save** button can be used to implement a Save and Approval process.
- For manually created store orders, the quantity will be set to the last requested quantity from the most recent approved store order.
- For externally created store orders, the quantity will be set to the external quantity.

Item Detail

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Figure 15-16 Store Order Item Detail



The Item Detail screen is used for selecting or scanning an item from the Store Order Items screen. Scanning or entering an item on this screen in the scan bar updates the quantity per the scan mode and refreshes the Item Detail screen for the item and quantity scanned. The item rules and validations will be the same as that on the Store Order Items screen.

Last Scanned (Scanned Details): Displays the details that are from the barcode.

- GS1 - will display the barcode, GTIN, and the contents of the barcode such as price, UIN, and so on.
- Type 2 - will display the barcode and the price.
- All other barcodes - will display the barcode.

You can page through existing items on the store order using the arrows at the top.

The item information including item ID, description, and image (which is per user preference) displays in the header. The primary location is displayed that will navigate to the Item Locations screen.

The bottom portion of the screen contains various read only fields about the item to assist in creating the store order.

The quantity can be edited and updated manually if permissions allow. For system and externally generated store orders the quantity for all items will be initially blank until the user enters or scans in a quantity for the items.

Additional fields include:

Delivery Timeslot: Will be displayed if the store is configured for delivery timeslots.

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- If a Delivery Timeslot was selected at the header level of the store order, it will be used as a default at the item level. The user will be able to change the timeslot. Changing the timeslot at the header will only apply to newly added items on the store order.
- The Delivery Timeslots list will be populated from the Delivery Timeslot Admin screen on the desktop.
- The list will have those delivery timeslots for which the user has data permissions.
- Delivery Timeslot is only available for those items that are 'SO' (store order) items.
- Delivery Timeslot is not required.
- When the store order is approved and published, the Delivery Timeslot will only be sent on the message if the publish indicator is **Yes**.

ROQ: Recommended order quantity. If the order was from an external origin, this is the quantity that is suggested to order by the external system.

Available: Available stock on hand for the item at the user's store.

Shopfloor: Shopfloor inventory for the item at the user's store. Only displayed if store is configured to display shopfloor/backroom.

Backroom: Backroom inventory for the item at the user's store. Only displayed if store is configured to display shopfloor/backroom.

Capacity: The total summed capacity for the item. Only displayed if store is configured to display sequence fields.

> **Note**
>
> Capacity is setup / defined via a third party upload.

Warehouse: Inventory for the item at the warehouse. Only displayed when a restriction of ‘warehouse’ has been defined.

Requested Today: Sum of all requested quantities on all 'Approved' store orders for today's date for the item at the user's store.

Last Requested: The store order quantity for the last/most recent 'Approved' store order for the item at the user's store. It will be displayed along with the Last Requested Date which is the approved date for the store order that has the last requested quantity.

Next Delivery Date: The next delivery date for the item at the user's store.

- This field is populated on the item location record from the merchandising system and only for 'SO' (store order) replenishment type items.

Ordered: The total remaining ordered quantity for the item at the store. This is for transfers, allocations and purchase orders.

Inbound: The total quantity approved to be sent to the user's store. This is for store to store transfers, warehouse and finisher deliveries and RTV shipments.

Unit Cost: The country level unit cost for the item. Only displayed if the user has proper permissions.

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> **Note**
>
> Unit cost will not be displayed if the currency of the store is different than that of the supplier (in the case that a supplier restriction is set up).

Price: Current price for the item.

The Sales Data will appear at the bottom of the screen and allow a user to view two types of sales data: Sales History and Sales Forecast. A user must have permission to view Sales History (Display Sales History) as well as to view Sales Forecast (Display Sales Forecast).

Sales History: Will display the past 4 weeks / 28 days (or less if 28 days do not exist) of Sales History for the item at the user's store. Sales History is pulled from sales within the systems that are found in Transaction History. This will display in a graph for the store and item with the sold quantity.

Sales Forecast: Will display the next 4 weeks/28 days (or less if 28 days do not exist) of future sales for the item at the user's store. Sales Forecast is retrieved via a web service from an external system such as a forecasting app. This will display in a graph for store and item with the forecasted quantity.

Done: Will return to the Store Order Items screen.

Quick Actions: Will bring up the Quick Actions menu. The footer menu, ellipsis button, contains:

- **Delete** : Will delete the item from the store order. If the item is part of an externally created store order, it will prompt the user to set the quantity to zero. Tolerances are not validated at time of deletion if an item has tolerances defined.

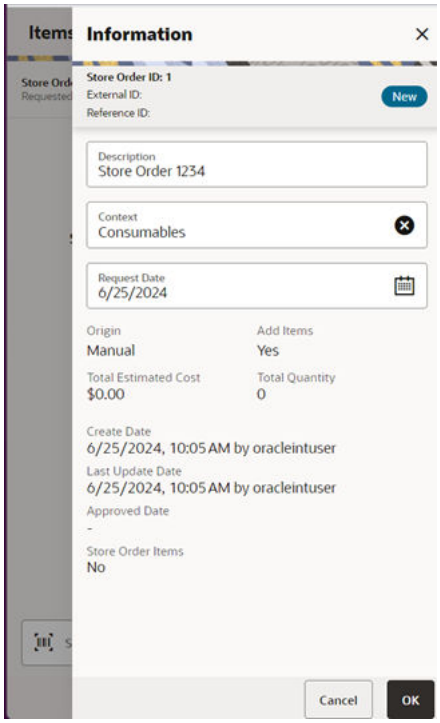
  > **Note**
  >
  > Tolerances are not validated at time of deletion if an item has tolerances defined.

- **Configure Screen Layout**: Displays a popup where the user can configure the Item Detail screen. See: Configure Screen Layout in Quick Orders JET Mobile.

Information Screen

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Figure 15-17 Information Screen



The Information screen is an informational popup that contains information about the header level of the store order. Editable fields require user to have Edit Store Orders permissions.

Fields include:

ID: System generated ID for the store order.

External ID: The ID from the system for externally created store orders.

Reference ID: ID associated to the store order that was copied.

Status: Status of the store order: New, In Progress, Submitted, Approved, and Canceled.

CFAs : The CFAs (flexible attributes) that have been set up for Store Orders in the desktop application are displayed and you can enter values for them. The CFAs that are set up as 'Required' must have a value entered for them before approving the store order. Editable if store order is still open and the user has ‘Edit Store Order CFA’ permission.

Description: Description of the store order. For system-generated store orders, this will be the description defined on the Product Group. This field is editable.

Context: The context type associated to the store order. This field is editable.

Requested Date: The requested date for the store order. This field is editable. If there are no 'SO' (store order) items on the store order, the request date must be greater than or equal to today. If there are 'SO' (store order) items that have a **Store Order Reject** indictor of **Yes**, the request date must be greater than the latest **Next Delivery Date** of the 'SO' items on the store order. This is also validated upon approval of the store order.

Origin: Where the store order originated: manual, system, or external.

Total Quantity: Total quantity of all items on the store order.

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Total Estimated Cost: Total cost of all items on the store order. This field is only displayed if the user has proper permission.

Add Items: Has a value of **Yes** or **No** and defines whether items can be added to the store order. For manually created store orders, this is defaulted to **Yes**. For store orders that are from an external system, or system generated, this may be set to **Yes** or **No**. **Yes** means that items can be added to the external store order, whereas **No** means that items cannot be added and only the items originally on the store order can be ordered.

Product Group ID: For system-generated store orders, this will display the Product Group ID from which the store order was generated.

Product Group Description: For system-generated store orders, this will display the Product Group Description from which the store order was generated.

Restrictions: The restrictions that were defined for the store order. These can include Supplier, warehouse, merchandise hierarchy, area, and store order items.

Create Date and **Create Use**r

Last Update Date and **Last Update User**

Approved Date and **Approved User**

Auto Approved Date: If the store order was auto approved, this field will be displayed

System Generated

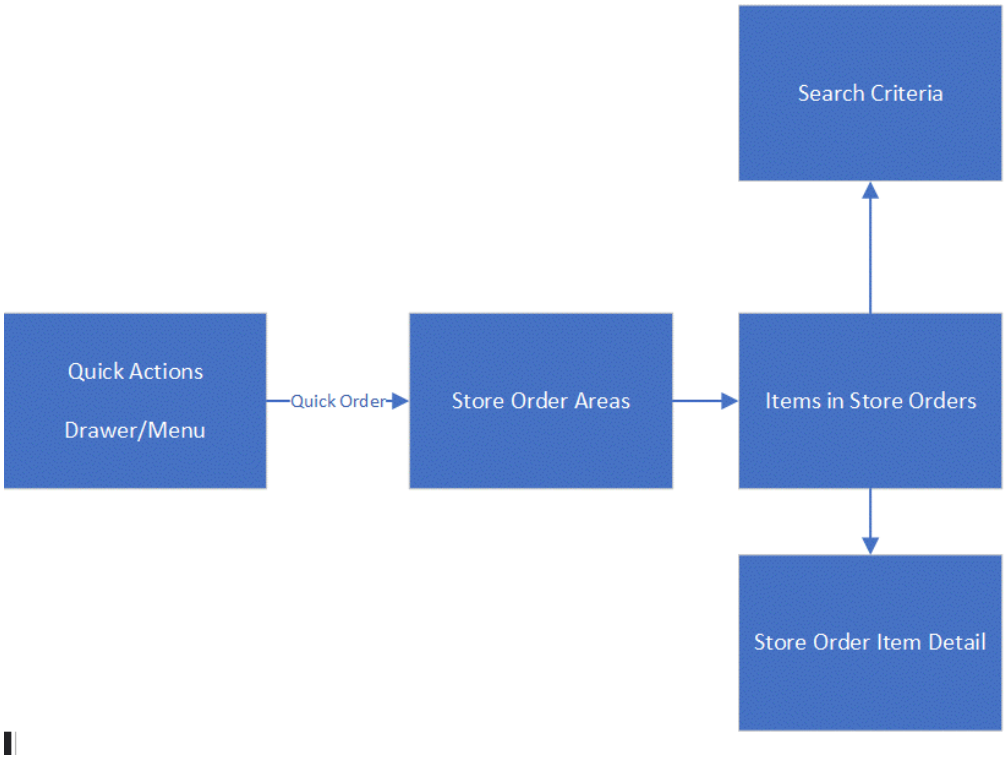
System Generated store orders are created on the desktop of the EICS application. See the Product Group & Product Group Schedule section of *Oracle Retail Enterprise Inventory Cloud Service User Guide* - Operations chapter. Those schedules created for today will generate the store order at the time of completing the schedule for stores on the schedule. Other store orders will be generated based upon their schedule in the nightly batch. System generated store orders will have an origin of 'system' and will be created in a status of 'New' with the items that were defined per the product group component without quantities. The request delivery date will be set per the Days before Delivery.

On the mobile the store order will allow the user to modify and save or approve it. Items can be added within the defined restrictions defined on the product group if the 'Add Items' indicator was selected on the product group.

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Quick Orders JET Mobile

Figure 15-18 Quick Order Flow

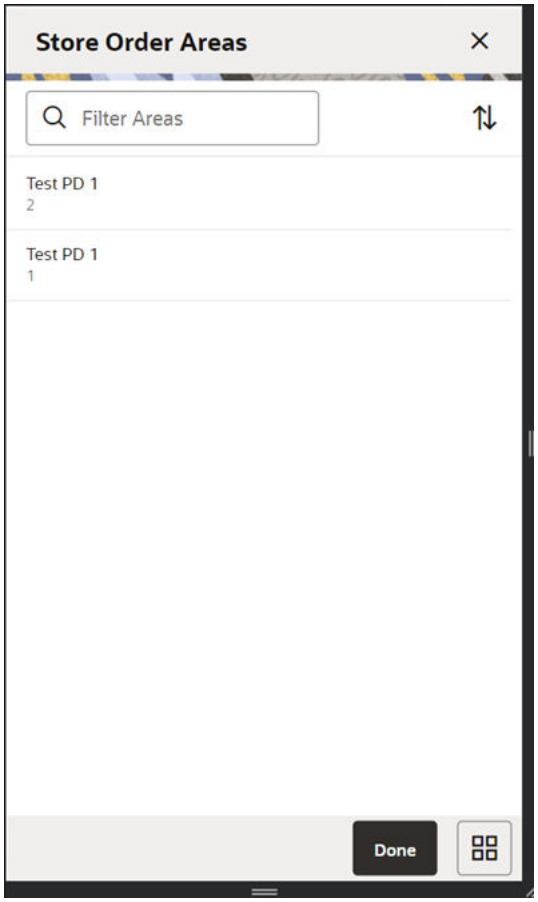


The Quick Order flow is available from the Drawer or Quick Actions menu on Jet Mobile when the user has Access Quick Orders permission. It will allow a user to find items in their store that are on open store orders. The items are identified by first selecting an area. The system will give a list of items that are on open external store orders for the selected Area. The user can then enter in store order quantities for the items. In this multi purpose dialog the user can also adjust the shop floor or backroom quantities

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Store Order Areas

Figure 15-19 Store Order Areas

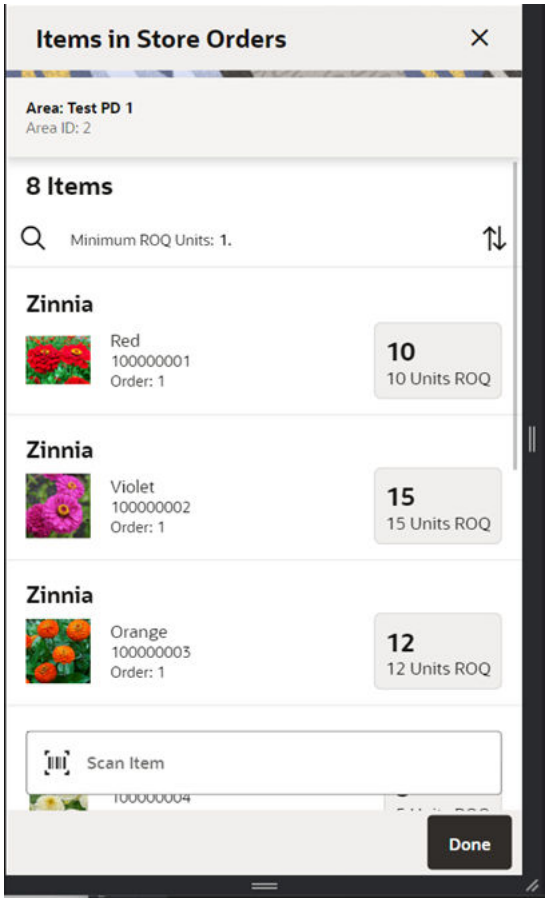


Store Order Areas is accessed by selecting **Quick Order** from the drawer or Quick Actions when the user has Access Quick Orders permission. This screen lists all Areas in the store that have ‘open’ store orders that are from external system. There is a filter to filter down the list of Areas.

Items in Store Orders

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Figure 15-20 Items in Store Orders Screen



Once an Area is selected the user will navigate to the Items In Store Orders screen which will list all items that are on ‘open’ status external store orders that are for the Area selected. The area selected displays at the header. This screen displays items across multiple store orders.

Items will include ID, description, image (user preference), order ID, and the recommended order quantity. Items will be sorted by item description and the user can choose to update the sort. Selecting an item will navigate to the Item Detail for that item. Selecting the search option will navigate to the Search Criteria (for Quick Order).

The user can scan or enter in the scan bar and if the user preference for Scan Navigate is set to ‘Yes’ the user will go the Item Detail screen and the quantity will not be incremented. If the Scan Navigate is set to ‘No’ the user will stay on the Items in Store Orders and the quantity will be incremented per the scan.

Quantity Validation

Tolerances come into the system from merchandising and are defined on the item/location. They can be set as a percentage or UOM, one will be sent, not both. Tolerances will be validated if they exist. A tolerance of 0, means that the store order quantity must match the external order quantity exactly, the quantity field will be defaulted to the external order quantity and disabled. Tolerance UOM: The system will take the external order quantity and add the Tolerance UOM to it to get the upper range, and subtract the Tolerance UOM to get the lower range. Only for SUOM, not applicable to cases.

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Example: External Order qty = 100 units. Tolerance UOM = 10. Entered User Quantity must be 90-110

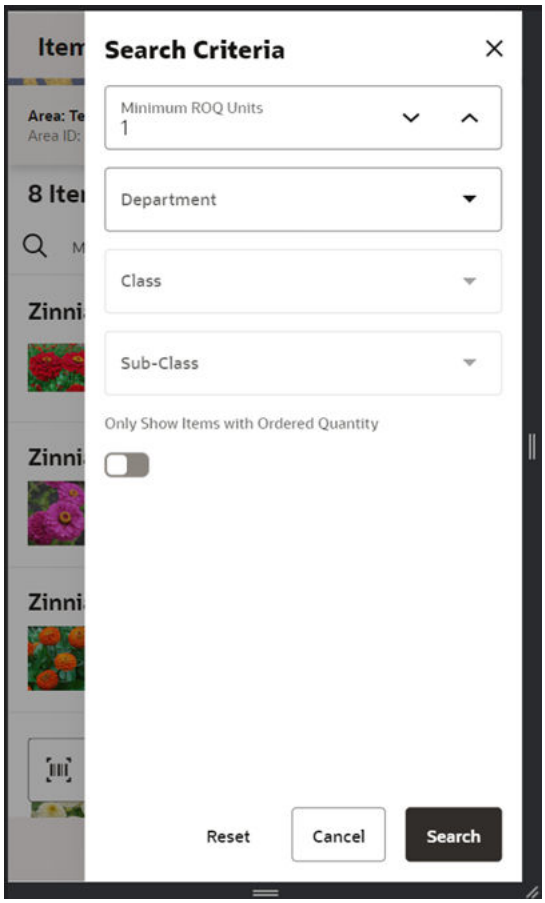
For Tolerance %: The system will take the % value x the External Order Quantity to get the tolerance quantity. That tolerance quantity will be added to the external order quantity for the upper range and subtracted from the external order qty to get the lower range.

Example: External Order qty = 100 units. Tolerance % = 7. Tolerance Qty = 7% x 100 = 7 units Entered User Quantity must be 93-107 units.

Done – will save the Store Order as 'In Progress' and exit back to the Store Order Areas.

Search Criteria

Figure 15-21 Search Criteria Screen



The Search Criteria Screen is accessed by selecting the search icon from Items on Store Orders. The Items on Store Orders list will be updated per this search criteria. Search fields include:

- Minimum ROQ – default to the store configuration, 'Default Minimum Store Order Search Quantity'. The UOM is displayed based upon store config, Store Orders Default UOM.
- Department
- Class

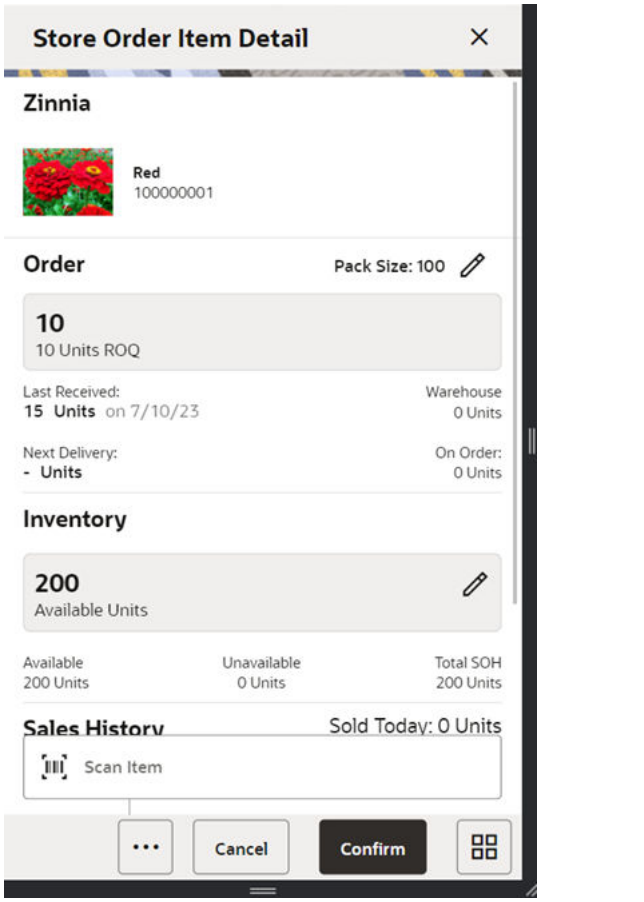
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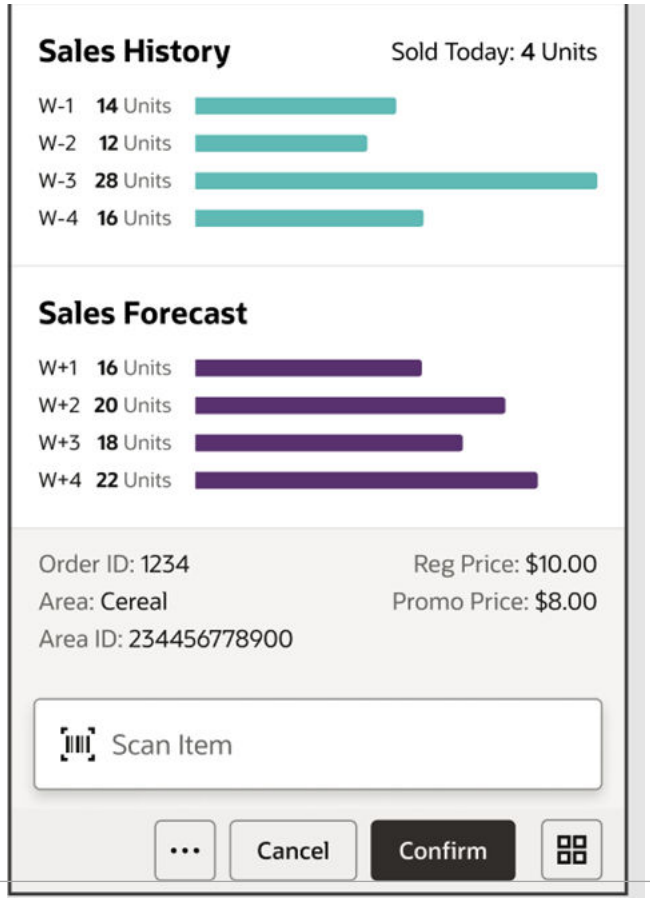
- Sub-class
- Only Show Items with Ordered Quantity – if this is selected only items have order quantities entered by the user will be shown. If not selected, any items.

Item Detail

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Figure 15-22 Store Item Detail Screen





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The Item Detail screen is accessed by selecting an item from Items on Store Orders or by scanning/entering an item into the scan bar on that screen. The header contains the item ID, description and image (per user preference). The order quantity can be updated. See quantity validation on Items on Store Orders.

Inventory allows for a direct update to the Shop Floor and Backroom inventory buckets if the ‘Display Shop floor / Backroom quantity’ store parameter is set to ‘Yes’. If it is set to ‘No’, then Available Inventory bucket can be adjusted.

Sales History will display if the user has ‘Display Sales History’ permission. This data is populated from Transaction History. Sales Forecast will display if the user has ‘Display Sales Forecast’ permission. The store must also be configured to call the Sales Forecast web-service. For both of these, they will be displayed in graphs with the system trying to display up to four weeks of data, if the data exists. Only full weeks will be displayed.

Additional informational fields on this screen include:

- Last Received - how many were last received on allocation, DSD, transfer.
- Next Delivery - the quantity on the next delivery. It is the in transit (In bound qty) for the ASN (Transfer,DSD, allocation).
- Warehouse – sum of inventory for the item at all warehouse.
- On Order - This field will display the total quantity remaining on the order. (same as Item Lookup)Transfers + Allocations + Purchase Orders.
- Available
- Unavailable
- Total SOH
- Order ID
- Area Description
- Area ID
- Regular Price
- Promotional Price

Footer Menu

Confirm: Store Order is updated to ‘In Progress’ status. It will get approved via the nightly batch.

- If adjustments were made to the inventory buckets, inventory adjustment will be written with reason codes of Quick Adjustment In and Quick Adjustment Out. The adjustments are published. Transaction history is written.

Print Ticket: Allows the user to print a ticket if the user has Print Ticket security permission.

Add to Item Basket: Adds the item being looked up to an investigate type item basket. If one or more 'in progress' status 'Investigate' type item baskets exist for the user's store, the system will add the item to the newest one. If one does not exist, the system will create one. The item basket will be 'static' and available in the Item Basket dialog of both the desktop and mobile.

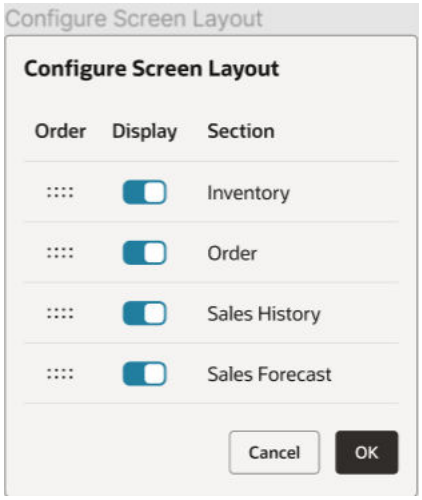
Remove from Item Basket: removes from the investigate item basket.

Configure Screen Layout: brings up a popup where the user can configure the Item Detail screen. See section below.

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Configure Screen Layout

Figure 15-23 Configure Screen Layout Screen



The Configure Layout screen is used to configure the data and layout on Item Detail. It will show a list of the sections to display in the screen, Inventory, Order, Sales History (Display Sales History permission), and Sales Forecast (Display Sales Forecast permission). The order of the sections can be modified by dragging the sections up and down. The switch on each section controls whether or not that section will be displayed.

- The settings made in this screen are applicable for the user until it changes again. Whenever the user comes to this screen, these settings will be applied automatically.
- When the user alters the settings, the changes will be effective immediately and for the future.

Integration

- Manual and System Created
- Externally Created

Manual and System Created

Those store orders that were created manually on the mobile or via a schedule in the system, will be sent out via RICS once approved. Any items with a zero quantity will not be sent. Non inventory items will be sent based upon a publish non inventory items configuration. If there are no items with quantities on the store order to send, the store order will not be sent. CFAs are also published based upon a publish attribute defined on the setup of the CFA. Delivery Timeslots will be published based upon the delivery timeslot publish attribute. Items will be sent and grouped together as being 'SO' store order items or NON store order items.

Externally Created

RMFCS

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Those store orders that were generated externally from RMFCS will be published back out to RMFCS via ICL.

Third Party

Store orders can come from an external system into SIOCS via a web service. These store orders will have an external order quantity to be used as a suggested order quantity. The user will enter/scan a store order quantity for the actual order quantity. The order will also indicate if additional items can be added to the store order by the user.

Those store orders that originated from an external system will be sent out via web service. All items will be sent out those that were originally on the store order from external system as well as those added in addition by the user. Items with a zero quantity will also be sent back to the external system to indicate no quantities are required. The rules for non inventory and CFAs are the same as that above for manually created store orders.

RMFCS Processing for SIOCS Created Orders (Manual And System)

A user is able to use store order functionality to request items regardless of the replenishment type normally used by the merchandising system to replenish the item. All items are sourced from either a warehouse or through a supplier depending on the sourcing parameters for the item specified in the replenishment system. Items specified as using Store Order replenishment (or items that are not set up for auto-replenishment at all) are sourced through the creation of one-off purchase orders or warehouse transfer requests only after the store has requested inventory using the Store Order functionality. There is no correlation between the purchase order/transfer and the item request. Any quantities requested for items that have a replenishment type other than Store Order are added above and beyond the quantity that is normally sourced through the replenishment system on the item's next replenishment review date. However, if the requested delivery date falls prior to the item's next replenishment review date, the request is sourced through the creation of a one-off purchase order or warehouse delivery instead. All inventory requested is sourced to the store at the earliest possible date given the replenishment review date, the supplier or warehouse lead time, and any other factors that may influence the time it takes a delivery to reach the store.

Externally Created Store Orders

Web Services

There are web services for creating, updating and deleting of store orders. Create allows for externally created store orders to come into SIOCS and simulates the SOCS store order create functionality. In addition it also has an external order number, external order quantity, and add items indicator. The add items indicator is used to determine if additional items can be added the store order when editing it within SOCS.

ICL Integration

Store Orders can be integrated into SICOS via ICL from RMFCS.

Integration will occur for:

- Purchase orders (POs) that are in ‘submitted’ or ‘worksheet’ status.
- Transfers that are in ‘input’ or ‘submitted’ status.
- Only semi-automated replenishment orders – these are flagged for review and if the ‘Store User Access’ is ‘Review’ or ‘Approved’ then they will integrate to SIOCS.

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- POs are for a single location.

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